Vision 3

File Maintenance (in Control Panel) User Guide

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File Maintenance

File Maintenance in Control Panel

In File Maintenance, the practice details, practice staff, and details of organisations such as hospitals, consultants etc, are added. These need to be set up before any clinical or registration data is entered in Vision. Thereafter, you will only need to use File Maintenance occasionally when there are changes or additions. This is also used for configuring electronic test request providers.

To access File Maintenance from the Vision front screen, click on **Management Tools** - **Control Panel**

, then **File Maintenance.**

This section describes File Maintenance within Control Panel. When you first access it, it takes a moment to build.

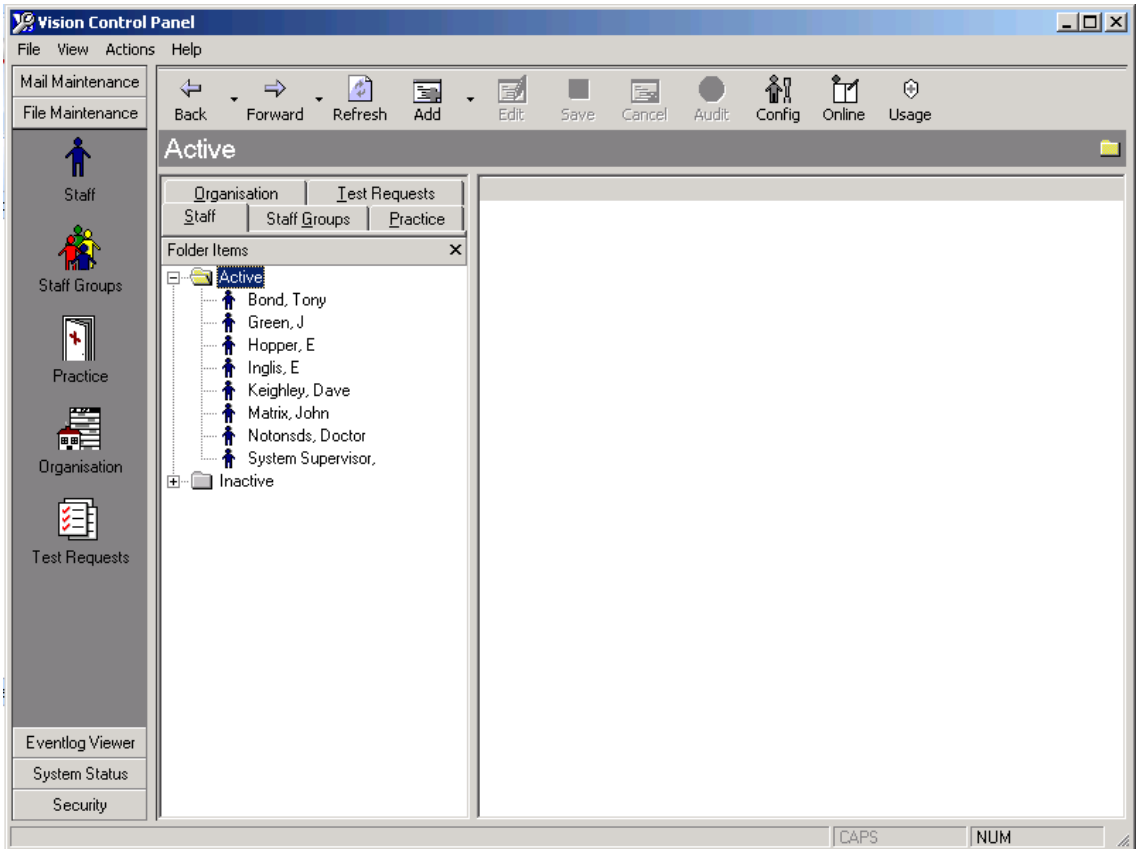


Figure 1: This is how Control Panel looks before Mail Manager/Maintenance is switched on

You can select one of the five options of Staff, Staff Groups, Practice, Organisation or Test Requesting either from the icons in the left-hand pane, or from the tabs under the blue Active header, or from the View menu.

For each individual entry, there are three common tabs on Organisations, Staff and Practice:

- an initial **Details** screen (Name, Mnemonic, Valid From),
- an **Identifiers** screen where any codes can be entered, such as a GP's GMC code,
- an **Address** tab, though the Main Address is always added from the initial Details screen.

In addition, the Staff module has a Professional tab.

Overview of File Maintenance

File Menu

When in the File Maintenance screen, the file menu has the following options:

Mail Maintenance - allows you to skip to the Mail Maintenance area of Control Panel.

File Maintenance - is ticked when you are in the File Maintenance area of Control Panel.

Eventlog Viewer - allows you to skip to the Eventlog Viewer area of Control Panel.

System Status - allows you to skip to the System Status area of Control Panel.

Security - allows you to skip to the Security area of Control Panel.

Icon Bar - if deselected hides the side panel navigation.

Status - if deselected hides the status bar at the bottom of the screen.

Actions Menu File Maintenance

Add - add a new organisation or staff member.

Edit - amend details of the currently selected organisation, staff member, or practice.

Audit - shows an audit trail of the currently selected organisation, staff member, or practice.

Find Persons - When within Organisations, you can enter a person's name to see which organisation they are entered under (see *Find Persons in Organisations* (page 43))

Refresh – Updates the File Maintenance lists.

Staff Config - Available to system supervisors only, this tabbed screen allows quick updates of GMC and GP codes, inactive staff, choice of word processor and classic printer profiles for prescriptions and drug labels (see *Staff Configuration Utility* (page 100)).

Online Services Config – Allows you to enable and configure Vision Online Services (See *Enabling Vision Online Services – Appointments* (page 111)).

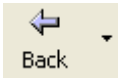
Vaccine Usage (English Practices) - Allows you to record practice consent and check when the last vaccine usage reports were run. (See *Vaccine Usage Reporting - Public Health England* (page 151)).

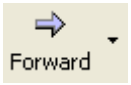
WCCG Config (Welsh Practices) – Allows you to configure referral options for the Welsh Clinical Communications Gateway (See *Welsh Clinical Communications Gateway (WCCG) Configuration* (page 158))

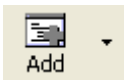
Assign Smartcard – Allows you to assign a Smartcard to an existing or new Vision user profile (See *Assign Smartcard - England* (page 111)).

Export Staff Language - Allows you to report on the written, spoke and read language skills of your staff (see *Staff Languages - Reporting* (page 159)).

Toolbar







The Add icon has a picklist with options that differ depending on the tab you are viewing, for example, if you are on Organisations: Add Organisation, Add Department, Add Person

Edit what is currently selected in the folder list. Disabled unless you have highlighted an item, eg a hospital

Save icon

Cancel icon

Audit icon – disabled unless you have highlighted an item

Staff Configuration Utility (Staff Maintenance Utility)

This option is available to system supervisors only. This is a tabbed screen allowing quick updates (see *Staff Configuration Utility* (page 100)):

From lists of staff, you can quickly update the GMC code and the GP Code, inactivate or activate staff – all activities normally carried out in File Maintenance – Staff, per member of staff.

From a list of workstations, you can quickly update the Prescription Printers, Drug Label Printers, and Word Processor choice – all functions from Options – Setup (Vision front menu).

Online - allows you to access the Vision Online Services Configuration screen.

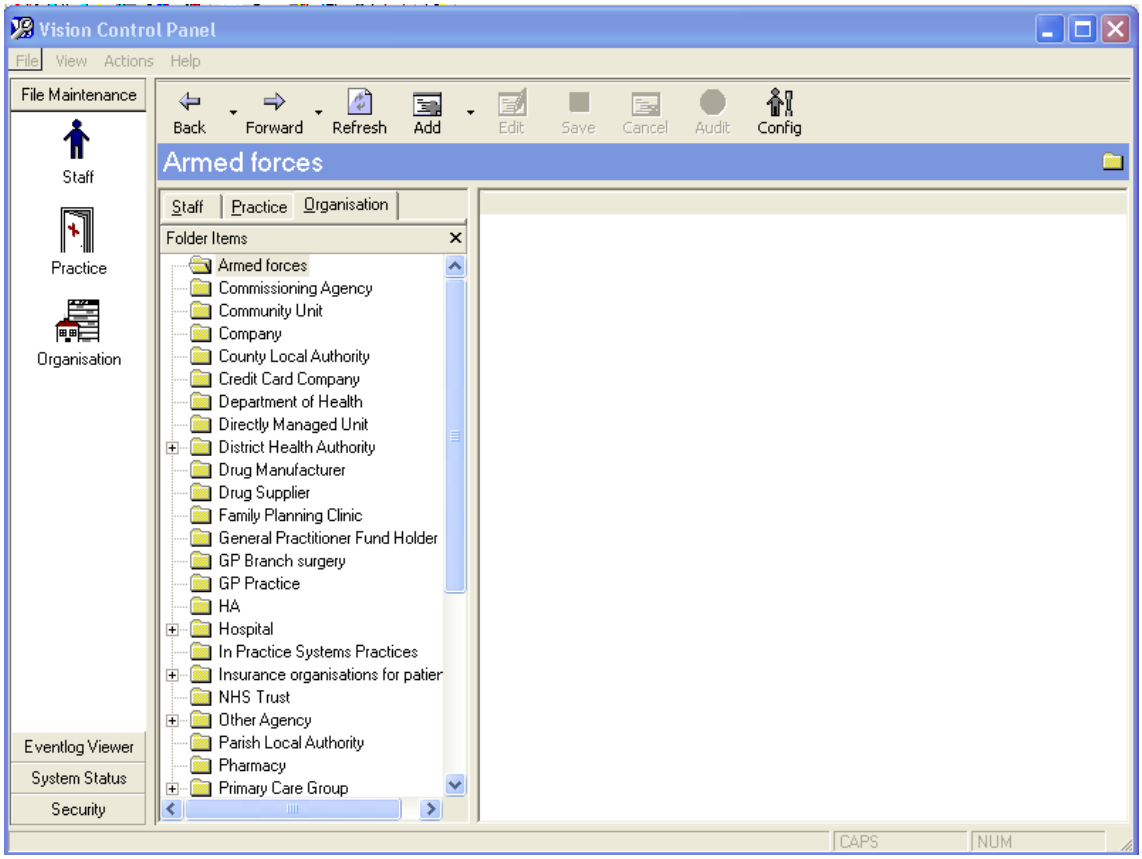
Usage - allows practices in England to access the PHE Vaccine Usage report screen where you can set practice consent and see when the last vaccine report was sent.

Organisations

List existing organisations

Click on

or the Organisations tab which lists all the categories of organisations. Any folders where there are records will have a plus sign which you can click on to expand the list.



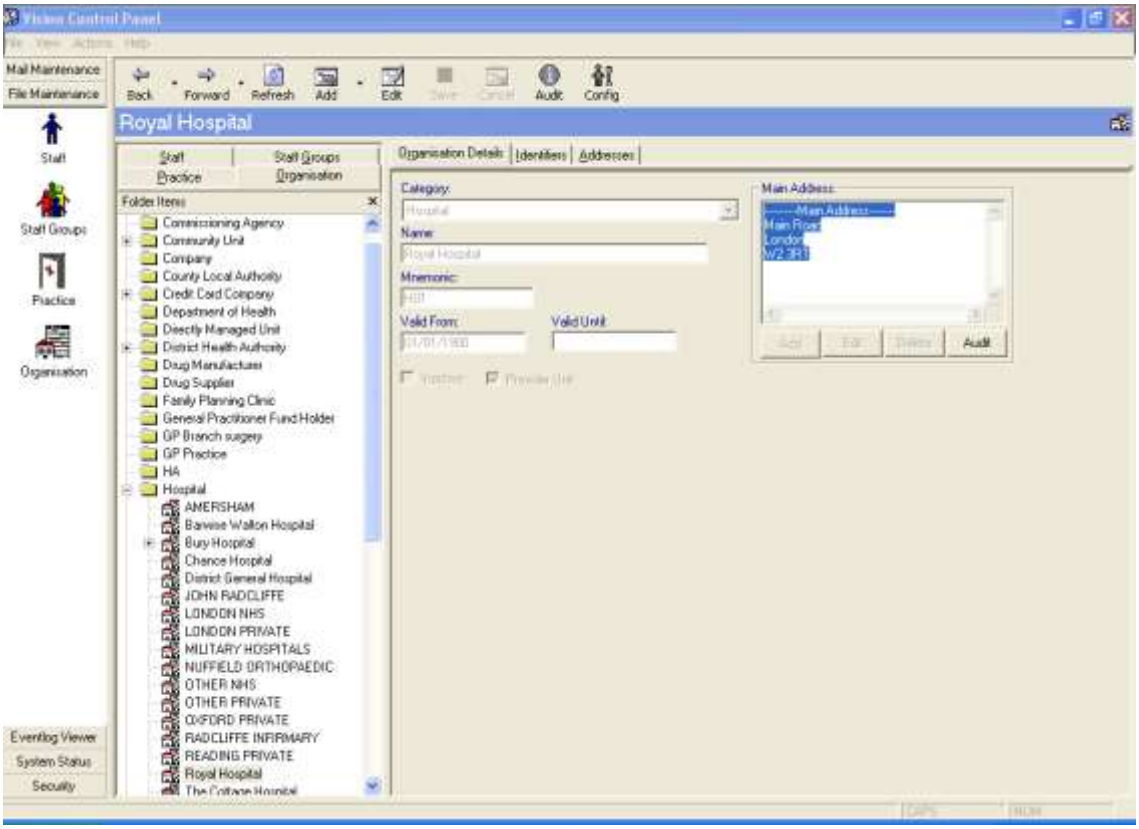
Clicking on an item in the list, brings up the details in the right pane.

The Edit

and Audit

icons will now be enabled if you want to make any amendments or look at changes. Once you click on Add or Edit, OK and Cancel buttons appear.

The details are listed under three tabs: Organisation Details, Identifiers (codes, reference numbers), and Addresses (including contact numbers).



Categories of Organisations

The following is a list of types of organisations you can add in File Maintenance - Organisation Details. The essential ones to enter are in **bold**:

- Armed Forces
- Clinical Commissioning Groups (CCG) - *In England only, if you select your CCG in the File Maintenance - Practice Details screen, then the PCT address is printed on prescriptions. If unselected, the HA will be printed instead. If blank, the TP is printed.*
- Commissioning Agency
- Community Unit
- Company
- County Local Authority
- Credit Card Company - *These appear on a picklist in Registration-Identifiers for private patients' credit card numbers*
- Department of Health
- Directly Managed Unit

- District Health Authority
- **Drug Manufacturer** - *Needed for the picklist when entering therapy batch numbers for immunisations on Therapy screen, Consultation Manager*
- Drug Supplier
- Family Planning Clinic
- General Practitioner Fund Holder
- GP Branch surgery
- GP Practice
- HA – *Use HA for a Strategic Health Authority in England or Local Health Board in Wales, and one with whom you are NOT electronically linked (linked HAs are entered in TP/HB/CSA). It is an optional entry on a patient's Registration screen.*
- **Hospital** - *If you select this, tick Provider Unit as well so this hospital appears on the picklist in Referrals-Add, Consultation Manager, and in a patient's Registration - IDs (Identifiers) so you can enter the hospital number.*
- In Practice Systems Practices
- Insurance organisations for patients - *These can be entered on a patient's Registration - Other.*
- **NHS Trust** - *Like Hospitals, if the Provider Unit box is ticked, they will appear in a picklist on Referrals-Add, Consultation Manager, and in a patient's Registration - IDs (Identifiers*
- Other Agency
- Parish Local Authority
- Pharmacy - *You can enter the patient's preferred pharmacy in Consultation Manager - Patient Details - Preferences*.
- Primary Care Group
- Primary Care Trust - *In Wales only, if you select your PCT in the File Maintenance - Practice Details screen, then the PCT address will be printed on prescriptions. If unselected, the HA will be printed instead. If blank, the TP is printed.*
- Prison Services
- Professional insurance organisations
- Regional Health Authority
- Registered non-NHS Provider
- **Residential Institutes** - *The Residential Institute code is entered for nursing home patients and other residential institutes, on a patient's Registration details, for practices with electronic links to the HA in England & Wales.*
- Schools - Schools can be recorded in Child Health Surveillance Management Plan, under Schooling, in Consultation Manager
- Self-Help Groups
- Social Services Department
- Special Health Authority
- **TP/HB/CSA** – *Use this in Scotland or Northern Ireland for your Health Board / CSA. In England and Wales, use this for a Health Authority with whom you have an electronic link. TP means Trading Partners, the term used in GP*

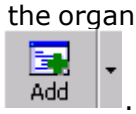
Communicator to denote an organisation to which there is an electronic link. An extra field of LINK is enabled on the Organisation - Add screen.

- Unregistered non-NHS Provider.

Add Clinical Commissioning Group - England

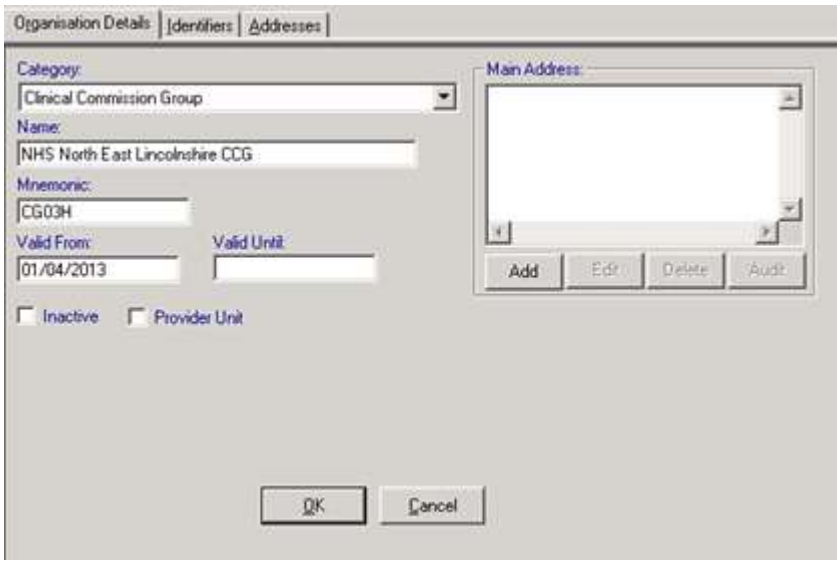
The following instructions tell you how to enter/check Clinical Commissioning Group details in Control Panel. If your CCG has not received statutory approval, you can enter the NHS Commissioning Board details here as a temporary measure:

1. Go to **Management Tools - Control Panel**.
2. Then go to **File Maintenance** and select **Organisation**

.
3. From the organisation list, select **Clinical Commissioning Group** and click on **Add** 

.
4. Complete the Organisation details tab (these details will display on your prescriptions):

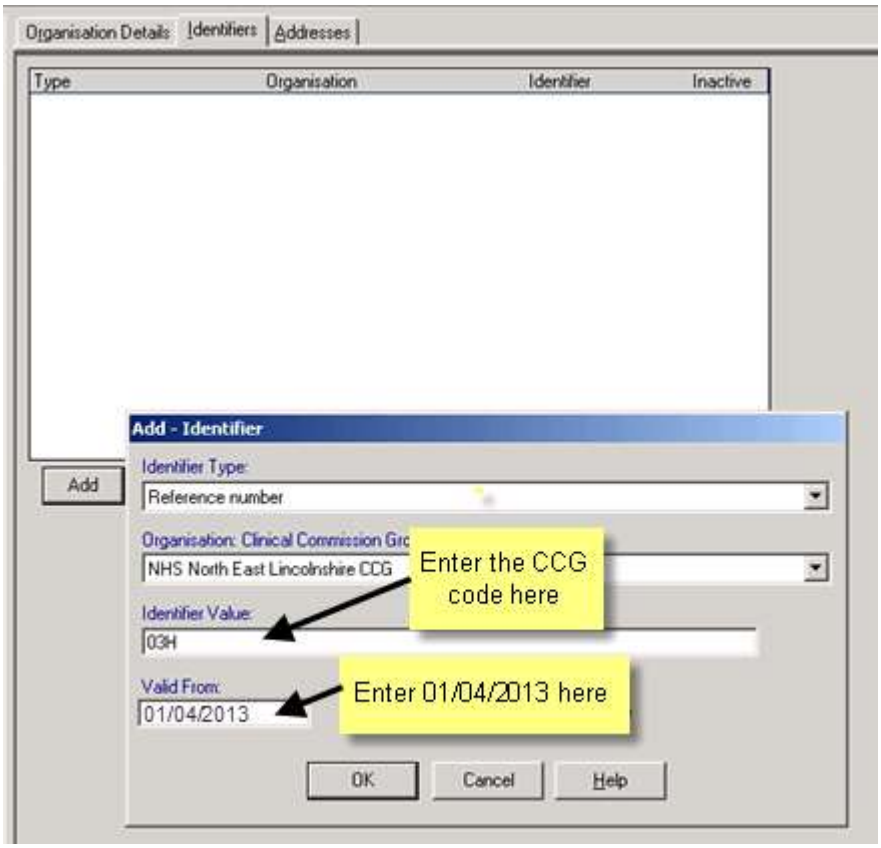
Equation 1: FIle Maintenance - Organisational Details



- **Name** - Enter CCG Name (or NHS Commissioning Board LAT if your CCG has not received statutory approval).
- **Mnemonic** - Enter a unique short name which Vision uses to recognise the CCG - ie C03H for North East Lincolnshire CCG. This is not the same as the CCG code which you will shortly enter in the identifiers tab.
- **Valid From** - Enter 01 April 2013. The PCT details are used before this date.
- **Main Address** - Click Add and enter CCG address and contact numbers.

5. Then, to enter the CCG/NHS Commissioning Board LAT code, select the Identifiers tab and click on Add:

Equation 2: FIle Maintenance - Identifier Details



- **Identifier Type** - Select CCG Code from the list.
- **Organisation: Clinical Commissioning Group** - Select your CCG from the list.
- **Identifier Value** - Enter your CCG/NHS Commissioning Board code (for format is NNA ie 12A). Please make sure that you enter this carefully as Vision cannot tell you if it is wrong. Temporary NHS Commissioning Board codes may be in a different format to CCG codes.
- **Valid From** - Enter 01 April 2013.

6. Click OK to save.
7. Then click OK to add the CCG to the Organisations list.

Note - You can add as many CCG/Commissioning Board organisation details as you wish. These details can be used in Vision Mail Merged letters.

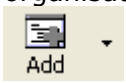
8. You now need to assign your CCG details to your practice details. See *Main Surgery* (page 49).

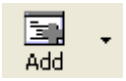
Add TP/HB/CSA - your main or linked Health Authority/Board

You MUST add all the Trading Partners or Health Boards (Health Authorities) with which you have patients registered before you add any patients.

TP stands for Trading Partners, which is the agency GP Communicator uses for electronic links, in this case a Health Authority for Registration Links or Items of Service in England & Wales. This enables three fields: **Link** and **Cipher** and **GP Abeyance**.

1. In Control Panel, select File Maintenance.
2. Click on

or the Organisation tab to list existing organisations.
3. To add:
   - Either click on the yellow folder by TP/HB/CSA on the list of organisations so that it is opened then click on the Add icon 

. This opens a new screen with TP/HB/CSA already selected in Category.
   - Or click on the arrow to the right of the Add icon 

, select Add Organisation, and select TP/HB/CSA in Category.
   - Or right click pointing to TP/HB/CSA and select Add Organisation.

- *Organisation Details* (page 16)
- *Address and Contact Numbers* (page 18)

Organisation Details

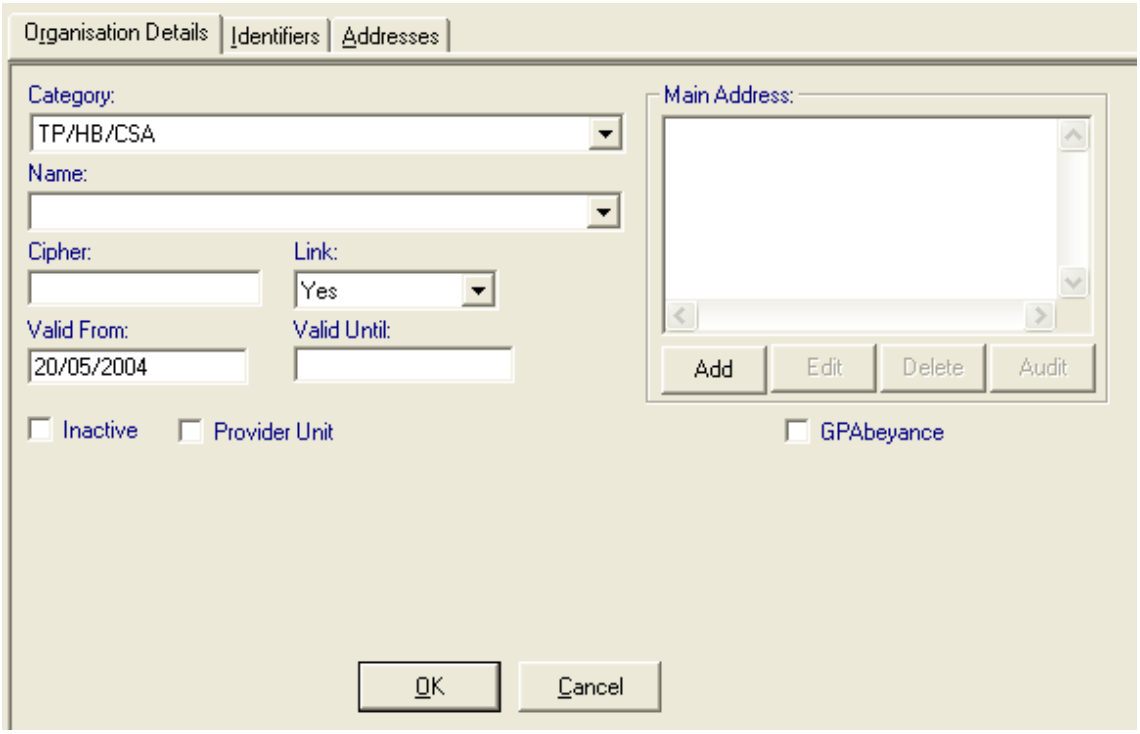
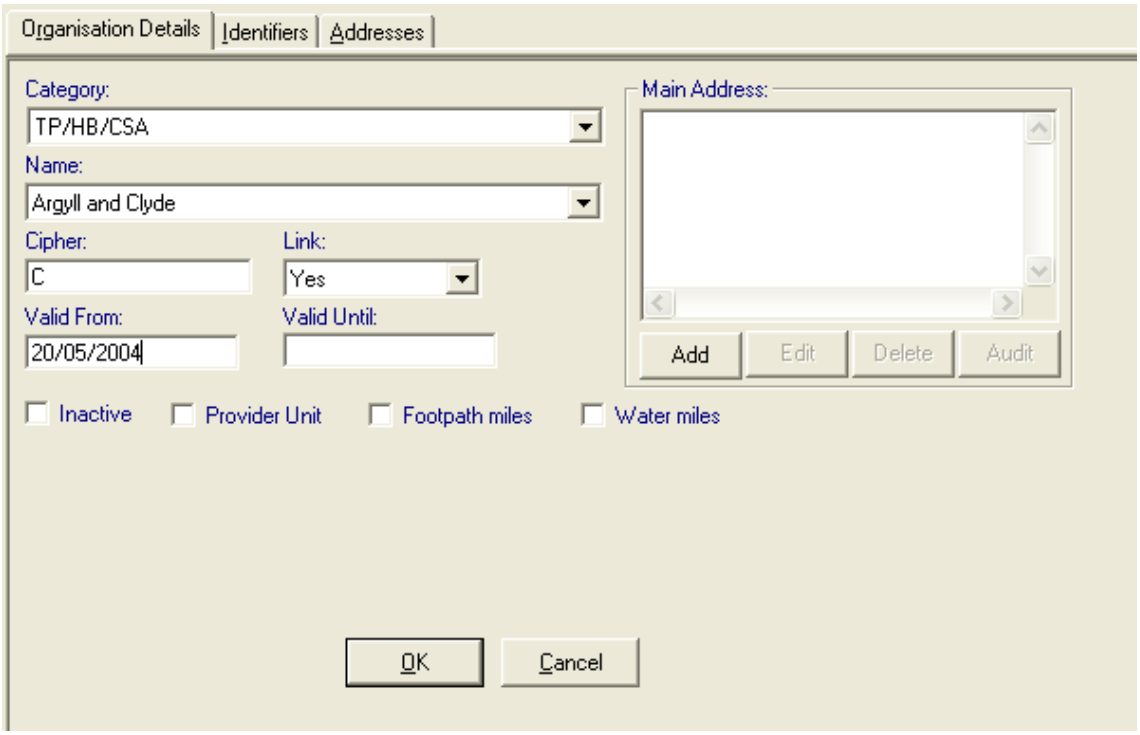


Figure 2: TP/HB/CSA in England and Wales - GP Abeyance is unique to England and Wales



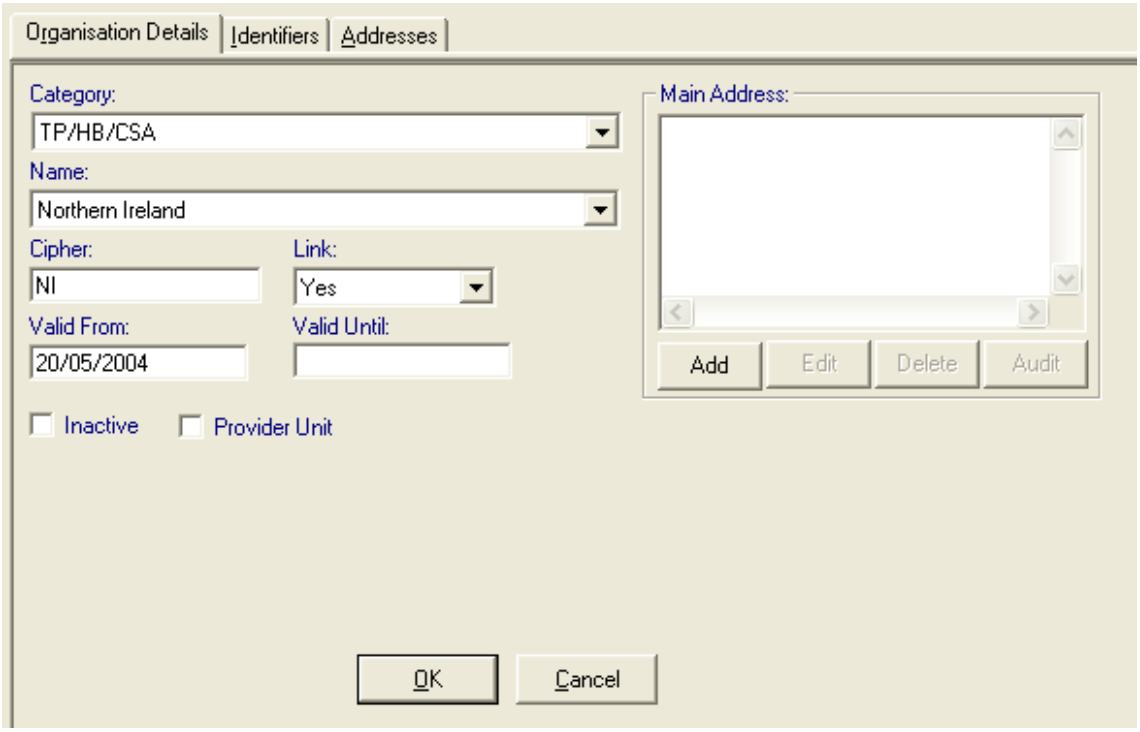


Figure 3: TP/HB/CSA in Northern Ireland

1. **Name –** Select from the dropdown list. You can type the first letter to reach that part of the picklist. For Northern Ireland practices, select Northern Ireland. See *Local Health Board in Wales* (page 22) *Scotland and Northern Ireland Health Boards* (page 23)
2. The **Cipher** fills in automatically once you have selected the name. This is a one, two or three letter code, for example in England & Wales, BIR Birmingham; in Scotland C Argyll & Clyde; In Northern Ireland NI.
3. An extra field called **Link** is enabled.
   - Answer Yes if you are linked electronically for Registration Links (and IOS) in England and Wales, or for Scottish Partners;
   - No if you are not linked and there is no exchange of electronic data,
   - and Down if you are usually linked electronically but the Link is not currently working
4. **Valid From and Valid Until -** These date entries are optional. Valid from defaults to today's date. This is the start date of the association of the Organisation with the practice. If in the future you finish your association with the Health Authority, enter a Valid Until date and tick the Inactive box. Or just right click on the Organisation in the tree view and select Remove Organisation - this does not actually remove it but makes it inactive.
5. **GP Abeyance** – In England and Wales, some authorities let you register new patients to a GP whose list is in abeyance (ie GP has an End Date entered). Check this box if relevant. Individual Health Authorities will decide whether this option is to be made available to Practices under their authority. When registering a patient, data validation checks the patient's date of acceptance against the GP's end date if in existence (The GP end date is entered in *File Maintenance – Staff* – [GP] – *Professional* tab – *Date left Practice*). If GP Abeyance has been set to Y, then registration can occur before or after a GP's end date. If set to N, then registration can only occur *before* a GP's end date.

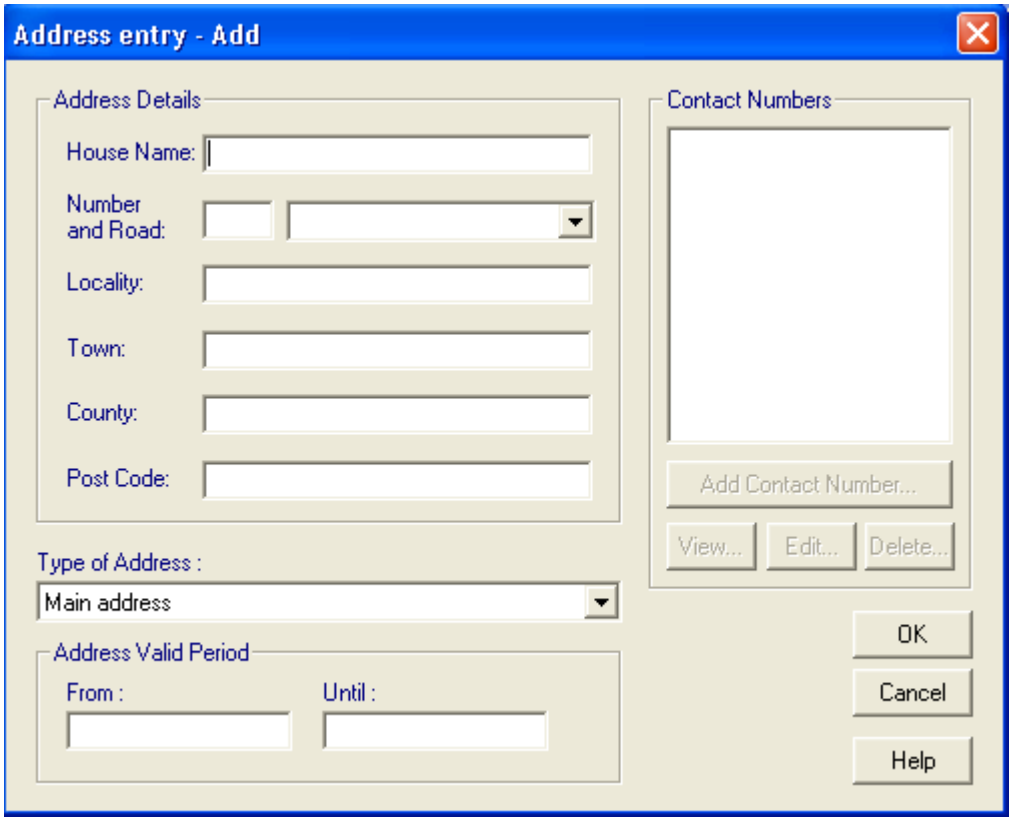
6. **Footpath miles, Water miles** – If entering a Health Board in Scotland, and the practice is allowed to claim rural mileage, check one or both of these boxes if relevant. If left unchecked, then these prompts do not appear on patients' Registration (Other) screens.

Address and Contact Numbers

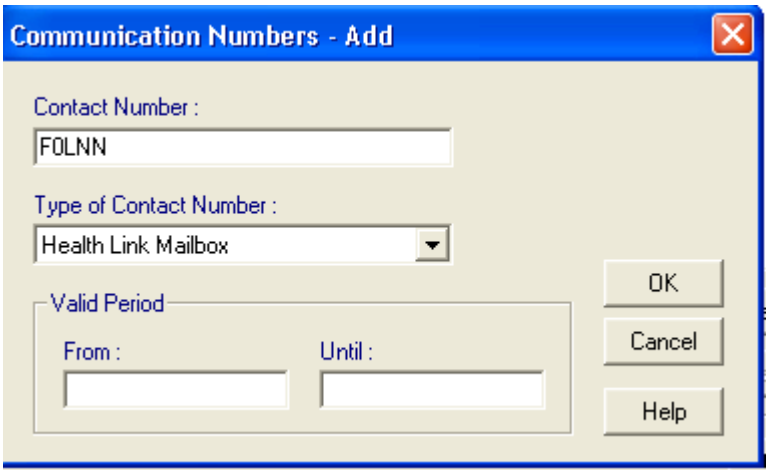
1. Click on **Add** under the **Main Address**.
2. You will see a message: *Remember to set up GP codes for this TP.* Click OK to this. It is reminding you that because you have added a new Health Authority, you need, in the Staff - Identifiers section under each GP, to add a GP code for this new TP/HB/CSA.

- In Main Address, enter free text for House Name, Locality, Town County.
- Use the Tab key to move from field to field (or Shift-Tab to move to a previous entry.
- In Road, you can type the first letter of the road then click on and select from a picklist of roads already in Vision. If not there, type in free text.
- The Town field must be filled.

3. Postcode is up to 8 characters including the space following a valid postcode format.



4. Click OK when you have entered the address which then enables **Add Contact Number**.
5. Click on **Add Contact Number**. First type in the contact number, then select the Type of Contact Number. Click OK.
6. For TP/HB/CSAs with which you have an electronic link, make sure to enter a Contact Number of Health Link Mailbox, 5 alphanumeric characters - the HA or HB cipher followed by 1, 2 or 3 zeros, eg F0LDS for Leeds, which is the link to the address in GP Communicator for HA messages (Reg Links and IOS). There is a range of other contact number types which you can enter: phone, email, mailbox, fax etc. Click Close to return to the front Organisation Details screen.



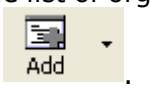
7. Click OK to save the details.

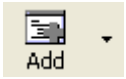
8. This completes adding the TP/HB/CSA.

Add a Strategic Health Authority in England

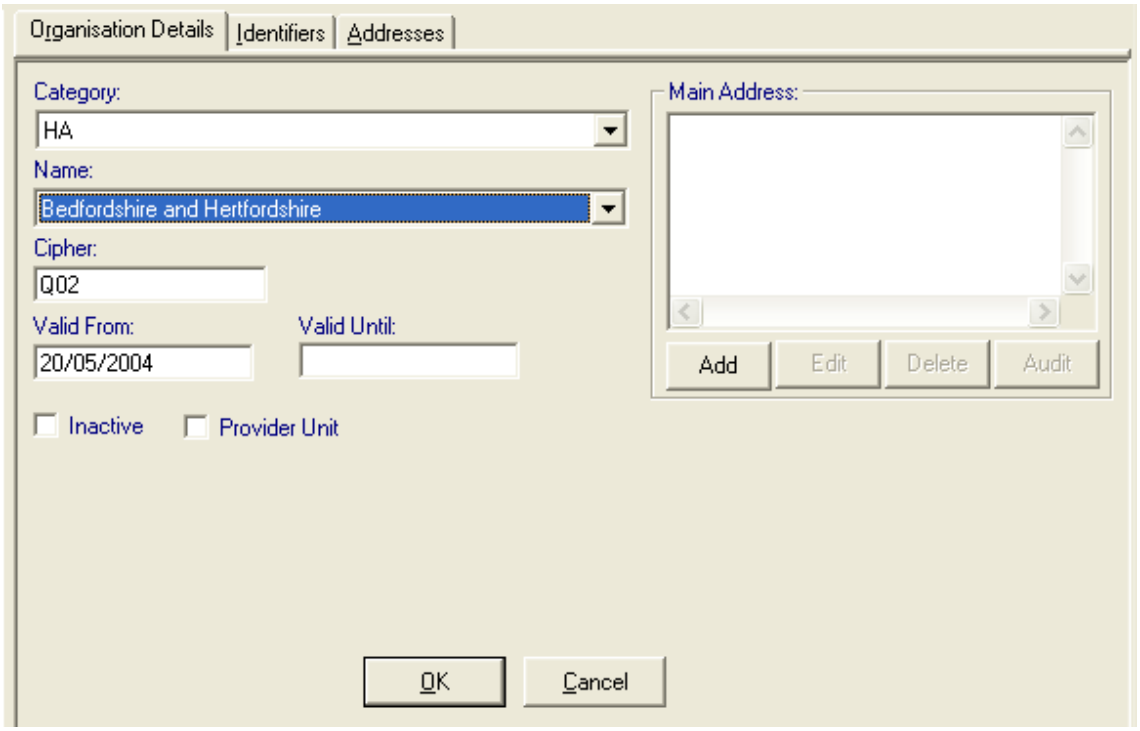
On a patient's Registration screen, you have to enter the TP/HB/CSA but you can also optionally enter the HA (Health Authority) or SHA (Strategic Health Authority) as well. The SHA can be added in Organisations. SHAs may cover several Trading Partners.

1. In Control Panel, select File Maintenance. Click on

or the Organisation tab to list existing organisations.
2. To add:
   - Either click on the yellow folder by HA on the list of organisations so that it is opened then click on the Add icon 

. This opens a new screen with HA already selected in Category.
   - Or click on the arrow to the right of the Add icon 

and select HA in Category.
   - Or right click point to HA and select Add Organisation.



Organisation Details (page 21)

Address and Contact Numbers (page 21)

Organisation Details

When you select the **Name**, the **cipher**, in this case a Q code, is filled in automatically.

- Cipher, Name:
- Q01,NORFOLK, SUFFOLK AND CAMBRIDGESHIRE HA,
- Q02,BEDFORDSHIRE AND HERTFORDSHIRE HA.
- Q03,ESSEX HA,
- Q04,NORTH WEST LONDON HA,
- Q05,NORTH CENTRAL LONDON HA,
- Q06,NORTH EAST LONDON HA,
- Q07,SOUTH EAST LONDON HA,
- Q08,SOUTH WEST LONDON HA,
- Q09,NORTHUMBERLAND, TYNE & WEAR HA,
- Q10,COUNTY DURHAM AND TEES VALLEY HA,.
- Q11,NORTH AND EAST YORKSHIRE AND NORTHERN LINCOLNSHIRE HA,
- Q12,WEST YORKSHIRE HA,.
- Q13,CUMBRIA AND LANCASHIRE HA,.
- Q14,GREATER MANCHESTER HA,
- Q15,CHESHIRE & MERSEYSIDE HA,.
- Q16,THAMES VALLEY HA,
- Q17,HAMPSHIRE AND ISLE OF WIGHT HA,
- Q18,KENT AND MEDWAY HA,.
- Q19,SURREY AND SUSSEX HA,
- Q20,AVON, GLOUCESTERSHIRE AND WILTSHIRE HA,
- Q21,SOUTH WEST PENINSULA HA,
- Q22,DORSET AND SOMERSET HA,
- Q23,SOUTH YORKSHIRE HA,
- Q24,TRENT HA,.
- Q25,LEICESTERSHIRE, NORTHAMPTONSHIRE AND RUTLAND HA,
- Q26,SHROPSHIRE AND STAFFORDSHIRE HA,
- Q27,BIRMINGHAM AND THE BLACK COUNTRY HA,
- Q28,COVENTRY, WARWICKSHIRE, HEREFORDSHIRE AND WORCESTERSHIRE HA

Address and Contact Numbers

1. Click on **Add** under the **Main Address**.
    - In Main Address, enter free text for House Name, Locality, Town County.
    - Use the Tab key to move from field to field (or Shift-Tab to move to a previous entry.

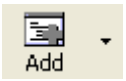
- In Road, you can type the first letter of the road then click on and select from a picklist of roads already in Vision. If not there, type in free text.
- The Town field must be filled.

2. Postcode is up to 8 characters including the space following a valid postcode format.
3. Click OK when you have entered the address which then enables **Add Contact Number**.
4. Click on **Add Contact Number**. There is a range of contact number types which you can enter: phone, email, mailbox, fax etc. First type in the contact number, then select the Type of Contact Number. Click OK.
5. Click Close to return to the front Organisation Details screen.
6. Click OK to save details. This completes adding the HA.

Local Health Board in Wales

From April 2003, the five Health Authorities in Wales were replaced by five Local Health Boards (LHBs).

1. In Control Panel, select File Maintenance. Click on

or the Organisation tab to list existing organisations.
2. To add:
   - Either click on the yellow folder by HA on the list of organisations so that it is opened then click on the Add icon 

. This opens a new screen with HA already selected in Category.
   - Or click on the arrow to the right of the Add icon and select HA in Category.
   - Or right click point to HA and select Add Organisation.

Organisation Details (page 22)

Address and Contact Numbers (page 23)

Organisation Details

When you select the **Name**, the **cipher**, in this case a Q code, is filled in automatically.

- **QW1 Gwent** (covers 6C2 Blaenau Gwent, 6B2 Caerphilly, 6A1 Monmouthshire, 6B9 Newport, 6C3 Torfaen)
- **QW2 Bro Taf** (covers 6B8 Merthyr Tydfil, 6A9 Thondda Cynon Taf, 6B6 Vale of Glamorgan, 6A8 Cardiff)
- **QW3 Dyfed Powys** (covers 6B7 Carmarthenshire, 6A4 Ceredigion, 6A3 Pembrokeshire, 6C4 Powys)
- **QW4 North Wales** (covers 6B1 Anglesey, 6A7 Conwy, 6C1 Denbighshire, 6B5 Flintshire, 6A2 Gwynedd, 6B4 Wrexham)

- **QW5 Iechyd Morgannwg** (covers 6A6 Swansea, 6B3 Bridgend, 6A5 Neath Port Talbot)

> Note - The LHB code is a five-character alphanumeric field with the first 3 characters identifying the LHB and the fourth and fifth characters to be filled with zeros.

Address and Contact Numbers

1. Click on Add under the Main Address. In Main Address, enter free text for House Name, Locality, Town, County. Use the Tab key to move from field to field (or Shift-Tab to move to a previous entry). In Road, you can type the first letter of the road then click on the down arrow and select from a picklist of roads already in Vision. If not there, type in free text. The Town field must be filled.
2. Postcode is up to 8 characters including the space following a valid postcode format.
3. Click OK when you have entered the address which then enables Add Contact Number.
4. Click on Add Contact Number. There is a range of contact number types which you can enter: phone, email, mailbox, fax etc. First type in the contact number, then select the Type of Contact Number. Click OK.
5. Click Close to return to the front Organisation Details screen.
6. Save Details - Click OK to save the details. The completes adding the local health board.

Scotland and Northern Ireland Health Boards

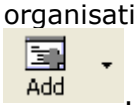
Scotland	N. Ireland
C Argyll & Clyde A Ayrshire & Arran B Borders Y Dumfries & Galloway F Fife V Forth Valley N Grampian G Greater Glasgow H Highland L Lanarkshire S Lothian R Orkney Z Shetland T Tayside W Western Isles	In Northern Ireland, although the Health Boards are indicated by the following standard codes, you will choose Northern Ireland from the list which fills in the cipher NI ZE0 Eastern Health and Social Services Board ZN0 Northern Health and Social Services Board ZS0 Southern Health and Social Services Board ZW0 Western Health and Social Services Board

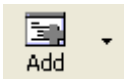
Add Hospital or NHS Trust

Add any NHS Trusts, hospitals and other local medical services or clinics to which you might make a referral. In addition, include their departments (eg ENT) and consultants (eg Dr Smith) (see *Add Department* (page 27), and *Add a Consultant* (page 30).

- Any hospitals with the Provider box ticked will then become a picklist on the Referrals-Add screen in Consultation Manager.
- In Registration, you can also record a patient's hospital number if the hospital is added in File Maintenance - Organisations.

1. In Control Panel, select File Maintenance.
2. Click on

or the Organisation tab to list existing organisations.
3. To add a hospital:
    - Either click on the yellow folder by NHS Trust or Hospital (or Community Unit, Directly Managed Unit, Family Planning Clinic) on the list of organisations so that it is opened then click on the Add icon 

. This opens a new screen with NHS Trust or Hospital (or whatever variant you chose) already selected in Category.
    - Or click on the arrow to the right of the Add icon 

and select NHS Trust or Hospital in Category.
    - Or right click point to NHS Trust or Hospital and select Add Organisation.

Organisation Details (page 24)

Identifiers (page 25)

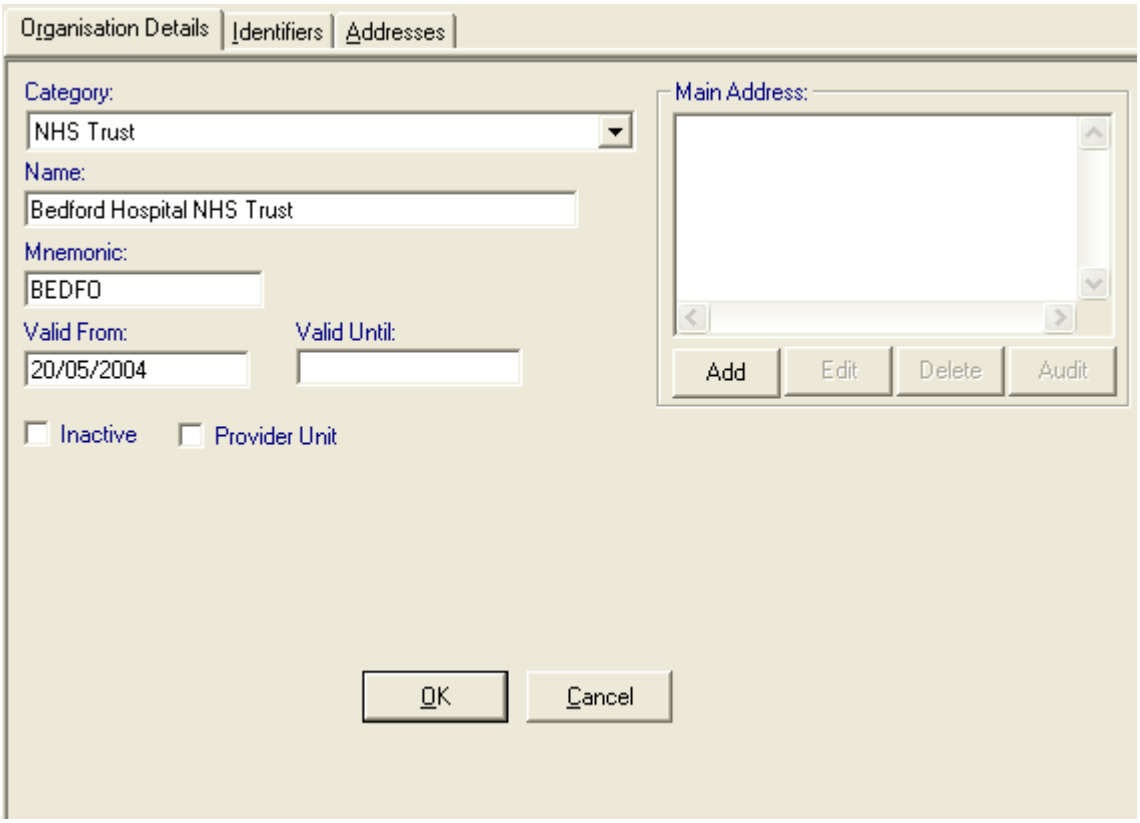
Address and Contact Numbers (page 26)

Save Details (page 27)

Organisation Details

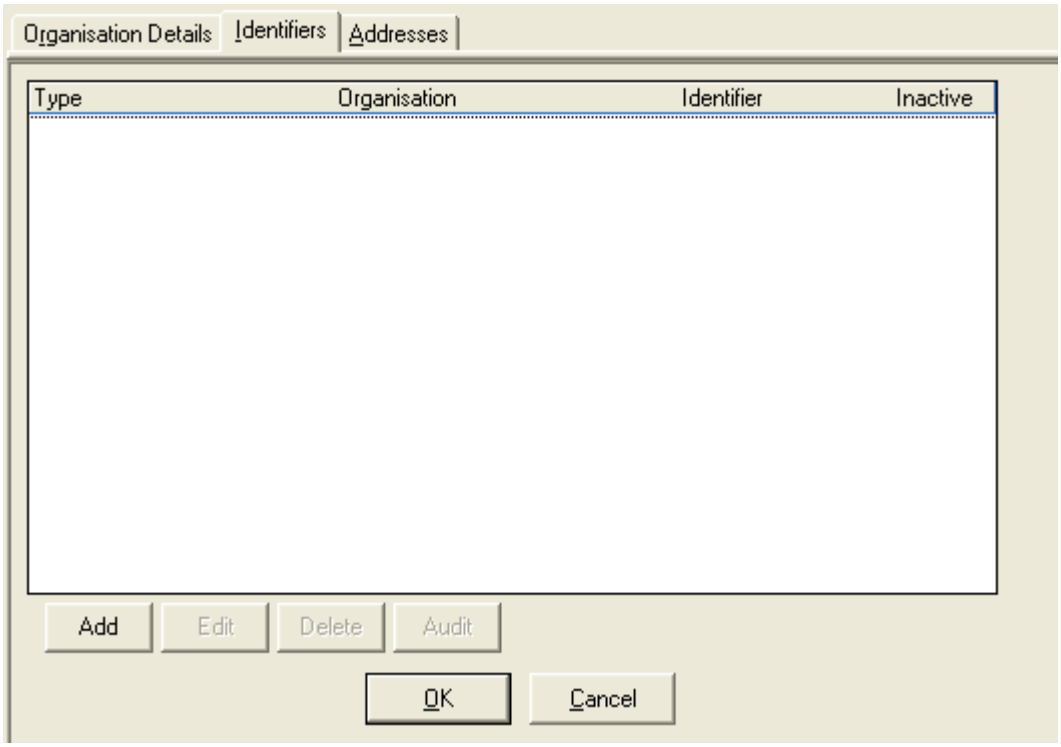
1. Check in Category that you have selected: Hospital, Directly Managed Unit, NHS Trust, Family Planning Clinic, Community Unit.
2. **Name** - Type in the full name of the NHS Trust or hospital. eg Bedford Hospital NHS Trust.
3. **Mnemonic** - Up to 5 characters are available here for a short unique name to refer to the organisation, for example, BEDFO for the above NHS Trust.
4. **Provider Unit** - This box is ticked by default for a Hospital, but not for an NHS Trust. If ticked, this ensures that:
    - the NHS Trust or hospital is shown in the picklist on the Referrals Add screen in Consultation Manager. You can do this for any organisation to which you make referrals.

- It appears on the picklist in Registration, Identifiers – Add, when adding a hospital number for a patient.

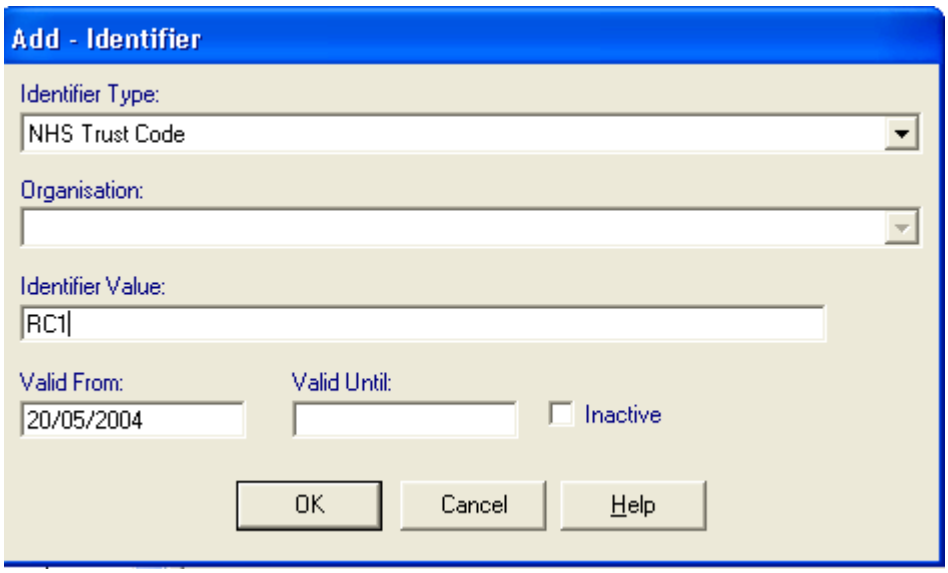


Identifiers

1. You must enter an organisation code for the hospital in Identifiers. Click on the Identifiers tab.



2. Click on Add.
3. At the Add - Identifier screen:
    - **Reference Number** - Select from Reference Code, NHS Trust Code, Non- NHS Provider Code, Mail Manager - Provider, Mail Manager - Related Provider, Mail Manager - Other. The Mail Manager options are entered if you are running Mail Manager to match the hospital identifier which will be on electronic pathology results.
    - **Organisation** - Disabled if you picked NHS Trust code in Reference Number, but enabled for you to select the hospital from the picklist.
    - **Identifier Value** - Enter a Reference number of the organisation code. For NHS Trusts, the 5 character code begins with R followed by A-9, then A-9, eg RC1. The final two digits are either blanks or zeros. This then links up with a patient's hospital number and can be entered on referral letters.
    - Click OK.



Address and Contact Numbers

1. From the Organisational Details tab, click on Add under Main Address.
    - In Main Address, enter free text for House Name, Locality, Town County.
    - Use the Tab key to move from field to field (or Shift-Tab to move to a previous entry.
    - In Road, you can type the first letter of the road then click on and select from a picklist of roads already in Vision. If not there, type in free text.
    - The Town field must be filled.
2. Postcode is up to 8 characters including the space following a valid postcode format.
3. **Type of Address** defaults to Main address.
4. Click OK when you have entered the address which then enables **Add Contact Number**.

5. Click on **Add Contact Number**. There is a range of contact number types which you can enter: phone, email, mailbox, fax etc. First type in the contact number, then select the Type of Contact Number. Click OK.
6. Click Close to return to the front Organisation Details screen.

Save Details

1. Click OK on the main Department Details screen.

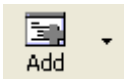
   This completes adding the department to an NHS Trust or Hospital.
2. Now go on and add the further departments for that NHS Trust or Hospital.
3. You can then add consultants or other staff within that department that you may make referrals to. See *Add a Consultant to a Hospital Department* (page 30).

Add Departments to a Hospital

Departments can be added within each Organisation and these departments can then have staff (Person) such as consultants attached to them. This is particularly relevant if hospitals have been entered as *Organisations* in order to record referrals.

1. In Control Panel, select File Maintenance. Click on

or the Organisation tab to list existing organisations.
2. Under NHS Trust, or Hospital, highlight the line to which you want to add departments, then.

   - Either click on the arrow to the right of the Add icon 

and select Add Department.
   - Or right click point to NHS Trust or Hospital and select Add Department.

Department Details (page 27)

Address and Contact Numbers (page 29)

Identifiers (page 29)

Save Details (page 27)

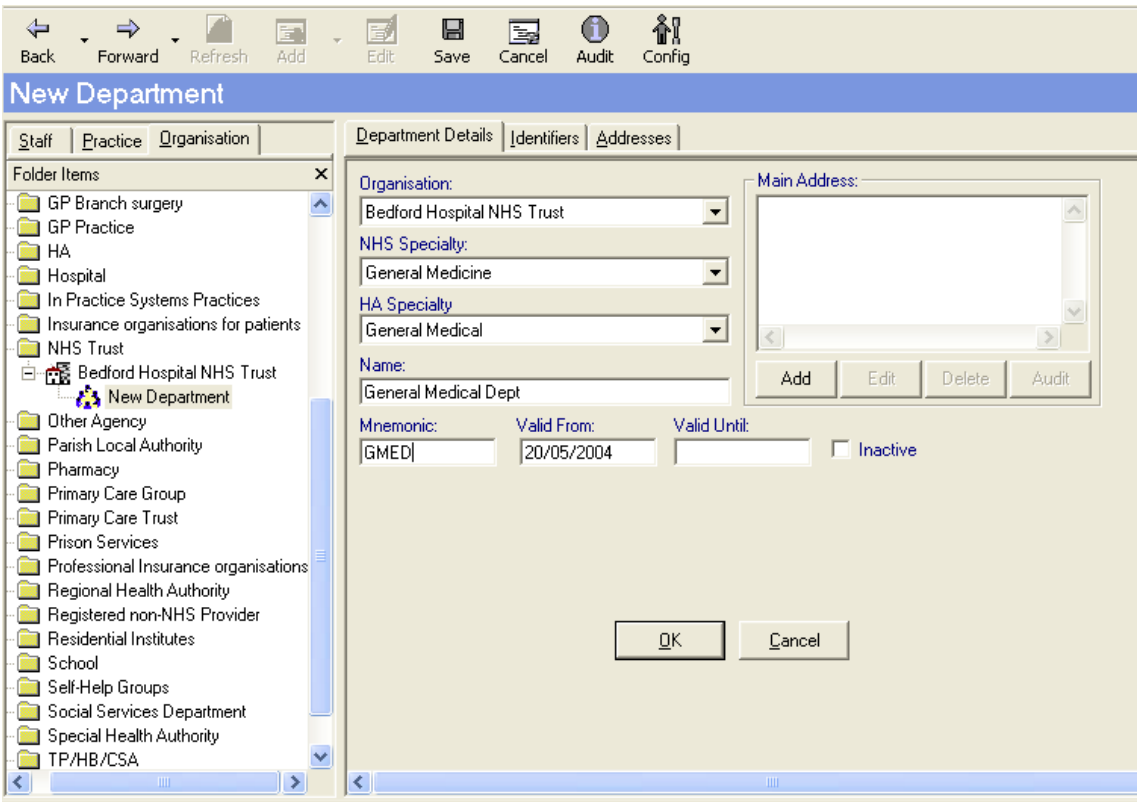
Department Details

1. On the new Department screen, the Organisation is filled in automatically.
2. NHS Speciality - Departments within Organisations can also be classified according to specialty. Select from the picklist - see *NHS Specialities* (page 85).
3. HA Speciality - The official list of 17 specialties is shorter than the NHS Speciality list and used for Referral Report purposes:

Dermatology	Obstetrics
Ear, Nose and Throat	Ophthalmology
General Medical	Orthopaedic
General Surgical	Other*
Genito-Urinary	Paediatrics
Geriatrics	Pathology
Gynaecology	Psychiatry
Neurology	Rheumatology
Non-referral report*	X-ray

* A referral to a department where the Department is classed as Non-Referral Report will not appear on referral statistics on the Referrals Report.

4. **Name** - Enter the name of the department in free text, for example, Cardiology Dept. Try to make the Department names consistent because on Referral Add in Consultation Manager, departments are listed in alphabetical order for selection (regardless of order in which they were entered in File Maintenance). In Name, either put the department name first (Radiology Dept, Orthopaedic Dept); or start them all with Dept *of* or *Dept. of* with a full stop, but do not mix the two.
5. **Mnemonic** - This is a mandatory entry that must be unique. Try and make is useful, reflecting the name of the department, for example HAEM for Haematology. Up to 5 characters are available here.
6. **Valid From / Valid Until** - Optional entry - This is the start date of the association of the Department with the practice. Entering any end date, if relevant, will make the department invalid.
7. **Inactive** - Only check this box if the Department is no longer to appear in Department lists (eg in Referrals on Consultation Manager).



Address and Contact Numbers

1. From the Organisational Details tab, you can optionally add the main address. Click on **Add** under **Main Address**.
    - In Main Address, enter free text for House Name, Locality, Town County.
    - Use the Tab key to move from field to field (or Shift-Tab to move to a previous entry.
    - In Road, you can type the first letter of the road then click on and select from a picklist of roads already in Vision. If not there, type in free text.
    - The Town field must be filled.
2. Postcode is up to 8 characters including the space following a valid postcode format.
3. Type of Address defaults to Main address.
4. Click OK when you have entered the address. This then enables **Add Contact Number**.
5. Click on **Add Contact Number**. There is a range of contact number types which you can enter: phone, email, mailbox, fax etc. First type in the contact number, then select the Type of Contact Number. Click OK.
6. Click Close to return to the front Organisation Details screen.

Identifiers

1. Click on the Identifiers tab.
2. **Identifier Type** - The two options are:
    - Mail Manager – Related Department
    - Mail Manager - Hospital Department

    Note - It is important that any hospital department relaying electronic pathology results (eg Haematology, Chemical Pathology) have the correct Identifier type and Identifier Value, which will appear on pathology messages, in order for these messages to match up. You may need to contact the path. Lab to find out what these codes are.
3. **Organisation** – This should default to the organisation that the department belongs to.
4. **Identifier Value** - Enter here the actual reference number, or code, which can be alphanumeric.
5. **Valid From and Valid To dates** - Optional dates which can be used for a date range that this reference number is valid. Leave blank if required.
6. **Inactive** - Only check this box if the currently displayed identifier is inactive.
7. Click on OK to save the entry (or Cancel if you want to exit without saving).

Save Details

1. Click OK on the main Department Details screen.

   This completes adding the department to an NHS Trust or Hospital.

2. Now go on and add the further departments for that NHS Trust or Hospital.
3. You can then add consultants or other staff within that department that you may make referrals to. See *Add a Consultant to a Hospital Department* (page 30).

Add a Consultant to a Hospital Department

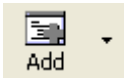
You can enter a consultant attached to a hospital department. This means that referral letters can be personalised.

The same principal can be used to enter other medical staff, or non-medical staff, attached to an organisation, for example, a social worker attached to Social Services organisation. In fact Person can refer to any external people, not directly employed by or attached to the practice.

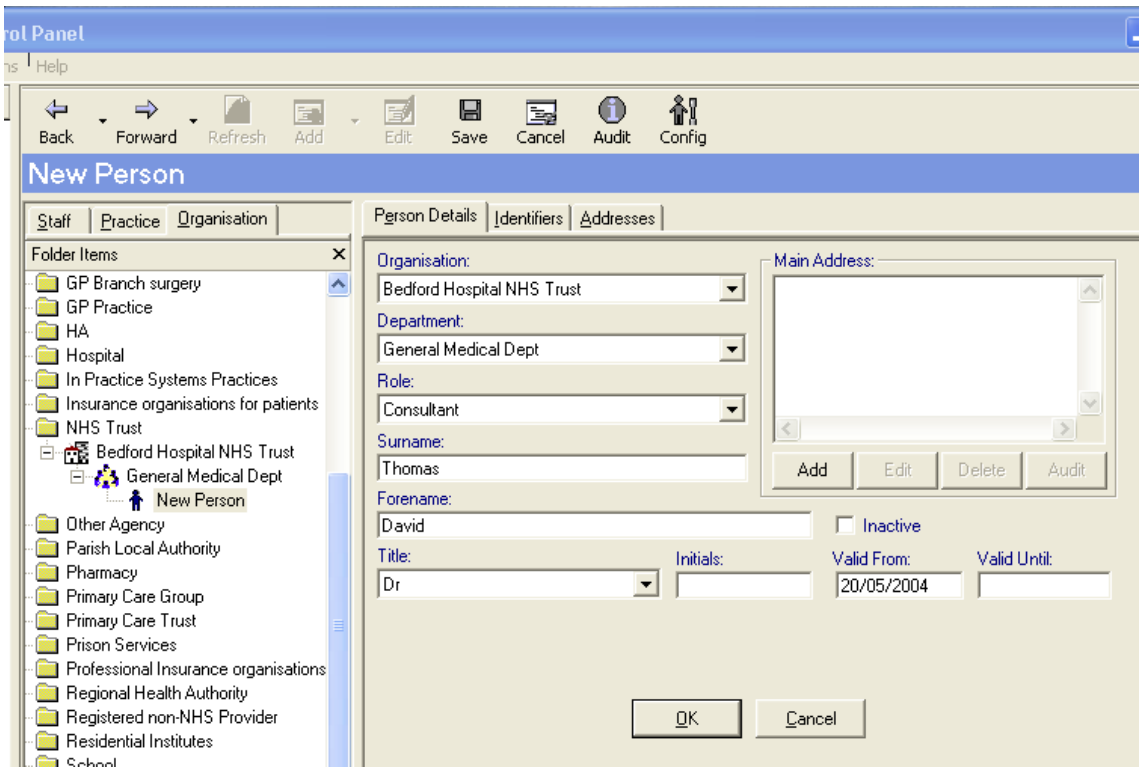
> Note - a Person can also be added *directly* to an organisation without a Department being added first, though you cannot use this for referrals in Consultation Manager, which need a department.

1. In Control Panel, select File Maintenance and click on

or the Organisation tab to list existing organisations.
2. You can either add a consultant (person) to a department, or directly to an organisation. Click on by the Hospital or NHS Trust to expand and list them.
3. Then click on on the Hospital you want, to list its departments.
4. Then click on the department where you are going to add a consultant.
   - Right click and select Add Person.

- or use the picklist by the Add icon 

and select Add Person



Person Details (page 31)

Address and Contact Numbers (optional) (page 31)

Identifiers (page 32)

Save Details (page 32)

Person Details

1. The Organisation (Hospital, NHS Trust) and Department will be filled in automatically if you are adding a consultant to a department.
2. **Role** - The **Role** is crucial and determines whether their name can be merged into a referral letter or not. Pick **Consultant** for a hospital consultant.
3. **Surname, Forename**, and **Title** - Use upper and lower case for the names. All three fields can be merged into a referral letter. Title is mandatory and can be used as a merge field in mail merge referral letters.
4. **Initials** are mandatory and are used as an identifier.

Address and Contact Numbers (optional)

1. Click on **Add** under **Main Address**.
   - In Main Address, enter free text for House Name, Locality, Town County.
   - Use the Tab key to move from field to field (or Shift-Tab to move to a previous entry.
   - In Road, you can type the first letter of the road then click on and select from a picklist of roads already in Vision. If not there, type in free text.

- The Town field must be filled.

2. Postcode is up to 8 characters including the space following a valid postcode format.
3. **Type of Address** defaults to Main address.
4. Click OK when you have entered the address. This then enables **Add Contact Number**.
5. Click on **Add Contact Number**. There is a range of contact number types which you can enter: phone, email, mailbox, fax etc. First type in the contact number, then select the Type of contact number. Click OK.
6. Click Close to return to the front Organisation Details screen.

Identifiers

> Note - You should enter a consultant code for consultants. If you adding a nurse attached to a department, you can select their NMC PIN number in Identifier Type.

1. Click on the Identifiers tab.
2. Click on Add.
3. In Identifier Type, select Consultant Code. In Identifier Value, type in the code - it is 8 characters, six numeric characters (their GMC code) with the addition of the C prefix and a last check digit. It can used as a merge field on referral letters. Note there are other options which will be used in Mail Manager - Mail Manager - Consultant, Mail Manager - Related Party (person), and Mail Manager - Person Performing Test.
4. Click OK.

Save Details

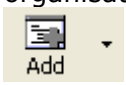
Click **Back** on the Person Details tab and click on OK.

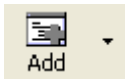
Add Nursing Home or Residential Institute

The Residential Institute is an important field for Registration Links in England & Wales. On a patient's Registration record, the RI code (1 or 2 characters) can be recorded as a code.

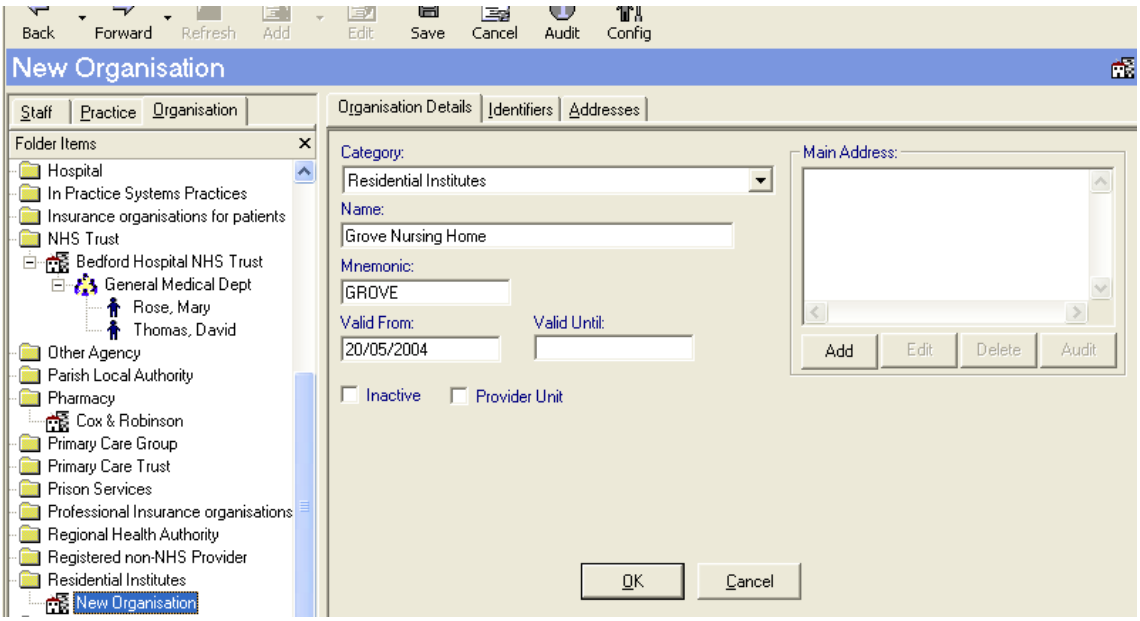
The RI code is issued by the health board - you don't make it up. You should contact the organisation in which the residential institute is based. They will be able to provide the list of codes which you will need to add to patients' Registration screens.

1. In Control Panel, select File Maintenance. Click on

or the Organisation tab to list existing organisations.
2. To add:
   - Either right click while pointing to Residential Institute and select Add Organisation;
   - Or click on the yellow folder by Residential Institute on the list of organisations so that it is opened then click on the Add icon 

. This opens a new screen with Residential Institute already selected in Category.
   - Or click on the arrow to the right of the Add icon 

, select Add Organisation, and select Residential Institute in Category.



Organisation Details (page 34)

Identifiers (page 34)

Address and Contact Numbers (page 34)

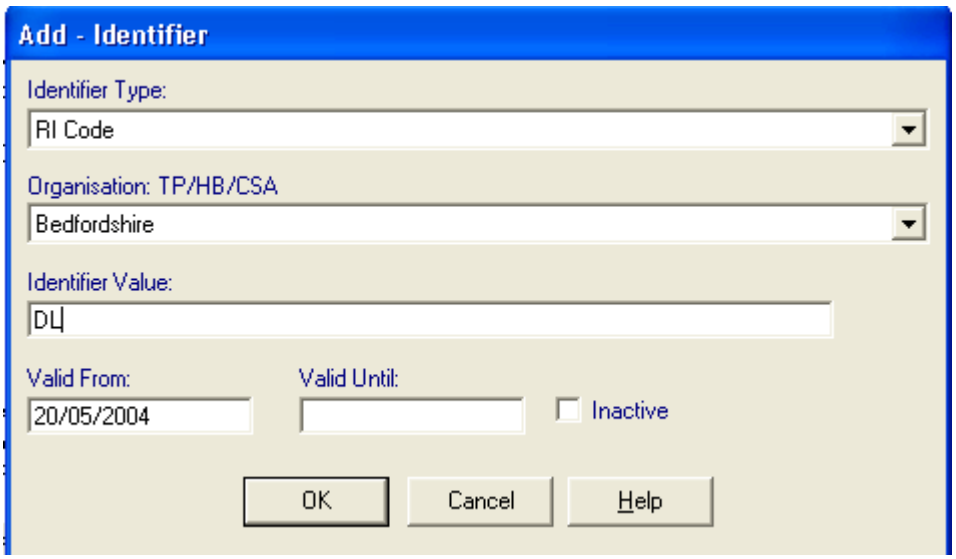
Save Details (page 35)

Organisation Details

1. **Name** – eg Devon Lodge Nursing Home.
2. **Mnemonic** - An unique short name to recognise this Residential Institute, eg DEVON for Devon Lodge. Note the Mnemonic is NOT the same as the RI code which you will add later in Identifiers.

Identifiers

1. Click on the Identifier tab.
2. Click on Add for the Add Identifier screen.
3. In Identifier Type, select RI code (rather than Reference Number).
4. In Organisation: Residential Institutes, select the TP/HB/CSA (Health Authority).
5. In Identifier Value, type in the RI code that the Health Board/CCG/LCG has given you. Note - each Residential Institute should have its own unique RI code.
6. Click OK and return to the Organisation Details screen.



Address and Contact Numbers

1. Click on **Add** under **Main Address**.
   - In Main Address, enter free text for House Name, Locality, Town County.
   - Use the Tab key to move from field to field (or Shift-Tab to move to a previous entry.
   - In Road, you can type the first letter of the road then click on and select from a picklist of roads already in Vision. If not there, type in free text.
   - The Town field must be filled.
2. Postcode is up to 8 characters including the space following a valid postcode format.
3. **Type of Address** defaults to Main address.

4. Click OK when you have entered the address. This then enables **Add Contact Number**.
5. Click on **Add Contact Number**. There is a range of contact number types which you can enter: phone, email, mailbox, fax etc. First type in the contact number, then select the Type of contact number. Click OK.
6. Click Close to return to the front Organisation Details screen.

Save Details

Click OK on the front Organisation Details screen to save the details.

Any other organisations I should set up?

The organisations listed below are used in other parts of Vision:

- **Primary Care Trust/Clinical Commissioning Group** - Enter your PCT of CCG. In Organisation – Identifiers, enter the PCT code (5 character format beginning with 5) or CCG code (NNA eg 12A). Record its address and contact numbers. On the Practice details screen, you can select a PCT or CCG from a picklist. The PCT/CCG address is printed on prescriptions rather than the HA, in England and Wales only (see *Main Surgery* (page 49)).
- **Clinics or Units** - to whom you may make referrals - follow the instructions in *Add Hospital or NHS Trust* (page 24).
- **Drug manufacturers** - These companies are used when recording batch numbers on practice administered therapy items in Consultation Manager.
- **Insurance organisations** - These can be recorded against a patient's Registration record (eg BUPA); include any for whom you might do insurance reports.
- **Medical Insurance organisations,** such as Medical Defence Union, which can optionally be entered on a GP's Professional details (File Maintenance – Staff).
- **Residential Institutes -** see *Add Nursing Home or Residential Institute* (page 32)
- **Social Services** - Add Social Service offices and other organisations to whom you may make referrals, such as McMillan Nurses that supply carers. The Carer can be added as a "Person" directly for that organisation. They will then be available on a Carers list from either Registration or Consultation Manager. Note - you can also add carers, even if they are not patients with your practice, within either of these modules.
- **Pharmacy** - Add a list of local pharmacies. In Consultation Manager, you can select a patient's Preferred Pharmacy in Patient Details. This can then be printed on a prescription at the top left, though long names may have to be truncated. It is recommended that you add the pharmacy NACS code in the identifier tab. This is especially pertinent to electronic prescribing where a nominated dispenser can also be selected. Adding the NACS code means that Vision can accurately match or mismatch the nominated and preferred pharmacy on the patient record. See Electronic Prescribing Help for further information.

- **Credit card companies** - The picklist on Registration-Identifiers for a patient will then allow credit card numbers to be entered for private patients.

Organisation Edit

1. In Control Panel, select File Maintenance.
2. Click on

or the Organisation tab to list existing organisations.
3. Click on by the category containing the item you want to amend.
4. To edit an entry:
   - Either right click while pointing to the item to be amended and select Edit Organisation;
   - Or click on the item to be amended then click on the Edit icon

.

Organisation - Remove or Inactivate

You cannot remove an organisation from a list. Instead you inactivate it. This prevents it appearing on any picklist (for example, hospitals or NHS Trusts, with the Provider Unit ticked, appear on picklists in Referral Add in Consultation Manager).

1. In Control Panel, select File Maintenance.
2. Click on

or the Organisation tab to list existing organisations.
3. Expand the category list using containing the organisation you want to inactivate.
4. Click on the organisation to be inactivated.
5. Click on Edit

or right click and select Edit Organisation.
6. On the Organisation Details screen, enter a Valid From date.
7. Click in the Inactive box.
8. Click on OK.

Organisation Audit

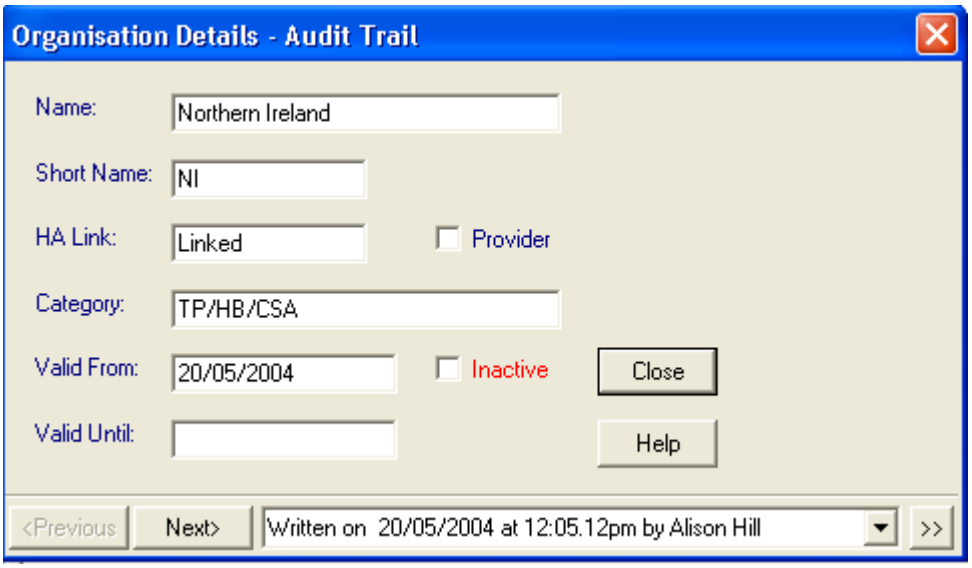
You can monitor the original records and any changes for the Organisation Details and Addresses.

Audit the Organisation Details screen

1. In Control Panel, select File Maintenance.
2. Click on

or the Organisation tab to list existing organisations.
3. Click on by the category containing the organisation you want to audit.
4. To audit an entry, click on the organisation to be audited, then click on the Audit icon

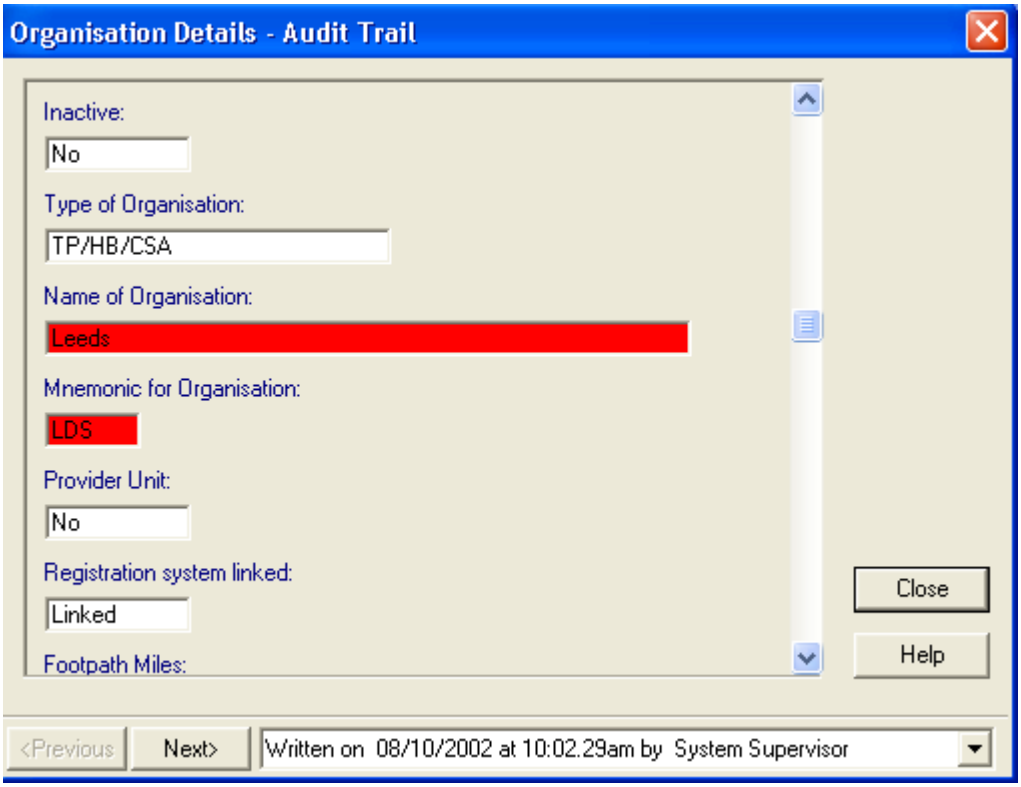
.
5. The **Organisation Details - Audit Trail** screen has details of additions and amendments made by staff members to the currently selected organisation.



6. Click on Next or Previous buttons which run through each change; or you can click on to display a list of the dates of the original record:
   - Written on [date] at [time] by [user signed on]

   and any changes:
   - Changed on [date] at [time] by [user signed on]
7. As you select a specific entry:
   - Any fields where changes or additions have been made will be displayed in **red** as the entry at that time.
   - Where an entry is **green**, this is the current entry for a field where there has been a previous change.
   - Any fields on **white** are the original entry.
8. If you click on to the right of the bottom window, you reach a second audit trail which you can scroll down to show all the entries on the Organisation Details screen.

9. Click on Close when finished.

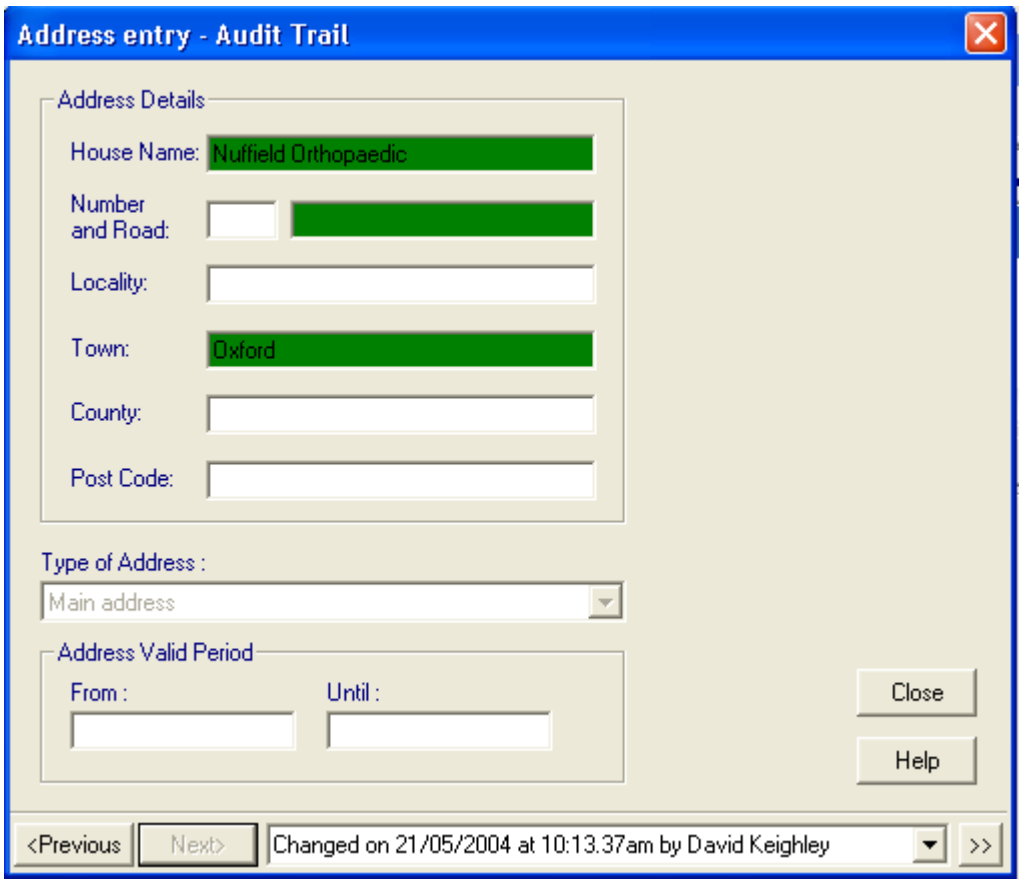


Audit the Organisation address and communications numbers

You can also audit any changes made to an Organisation's address or communication numbers.

1. Display the Organisation Details screen.
2. Either click on Audit from the Organisation Details tab, under Main Address; or go to the Addresses tab and click on Audit.
3. Click on *Next* or *Previous* buttons which run through each change; or click on to display a list of the dates of the original record - *Written* - and any changes - *Changed*. As you select a specific date:
   - Any fields where changes or additions have been made will be displayed in red as the entry at that time.
   - Where an entry is green, this is the current entry for a field where there has been a previous change.

4. Click on *Close* when finished.

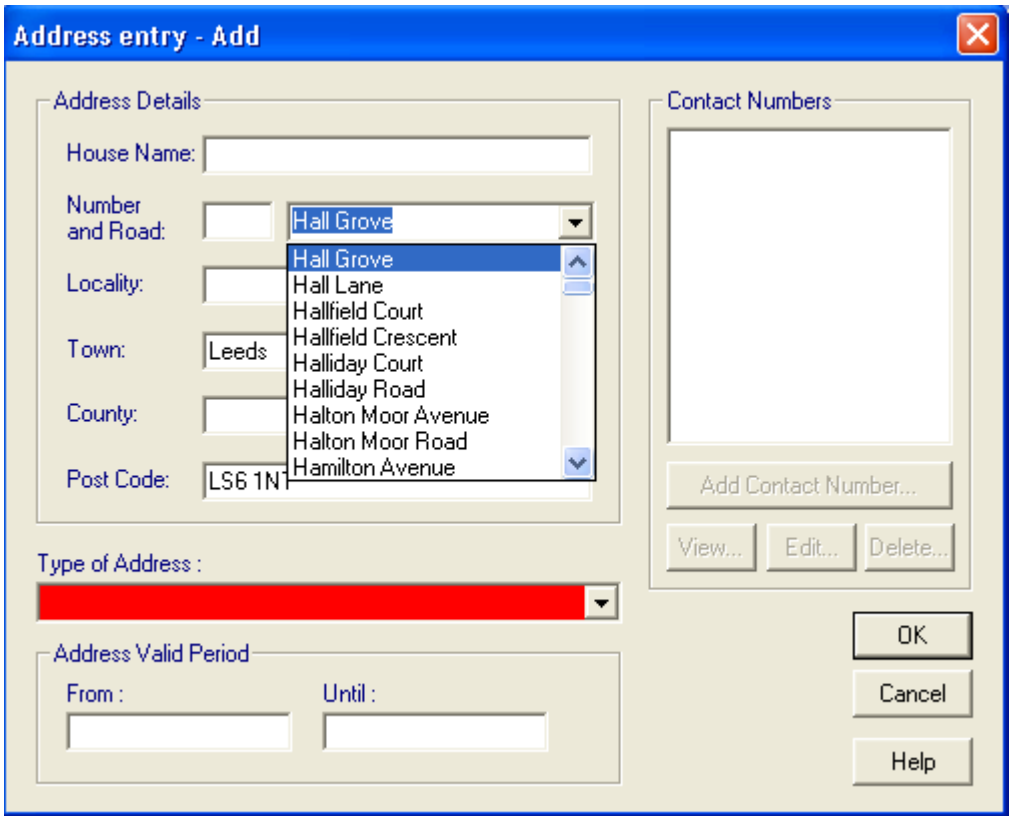


Organisation - Addresses tab

The easiest way to enter an organisation's main address is to use the Add button under Main Address on the Organisation Details screen.

An Address Entry - Add screen is displayed. Use the Tab key to move from field to field (or Shift-Tab to move to a previous entry). You must enter at least some text in the Town field before clicking OK.

- **House Name, Number** - House name can be up to 30 characters. It can be blank if there is no name. *Number and Road* are separate.
- **Road**, - You can type this in free text, but if you enter the first letter or two or a road name, then press the arrow by the picklist, all roads added to Vision are listed, beginning with the letter you typed. Select the right one, or if not there, type the road name in free text, up to 30 characters.



- **Locality -** This is optional.
- **Town** - You must at least make an entry in *Town*.
- **County** - This is optional.
- **Postcode -** Postcode is up to 8 characters including the space following a valid postcode format You may not enter half a postcode, such as SW1.
- **Type of Address -** If you are adding the main address from the front tab Organisation Details, this will default to *Main address*. If you are adding a second address from the Addresses tab, this defaults to *Other*.
- **Address Valid Period** - This is optional and can be left blank; or you can enter a date range, or just the From date (and leave Until blank) when the address was in use for your practice.

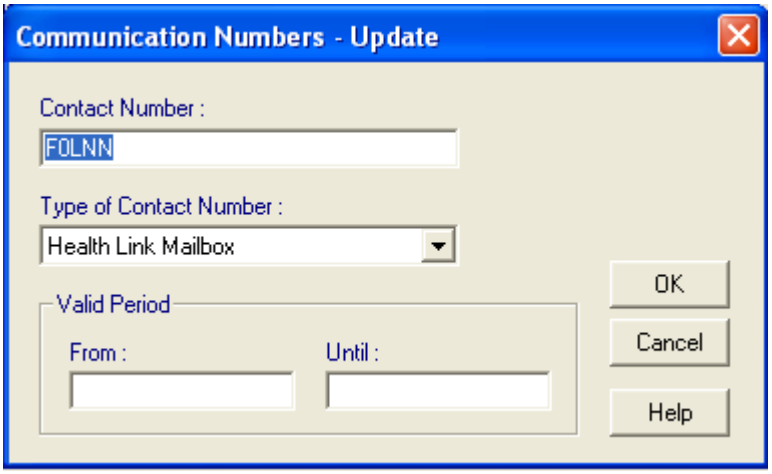
If you are adding telephone and other numbers, see below Contact Numbers.

Note - if you click on OK at this point and you have missed the mandatory entry of town, you will be reminded to go back and fill this in.

Clicking OK enables the Add Contact Number button.

Contact or Communication Numbers

1. To enter the telephone and other numbers of this organisation, from the Address entry - Add screen, click on Add Contact Number.



- **Contact Number** - First type in the Contact Number. You can use free text to add, for example, extension numbers, or include STD codes.

Note - for TP/HB/CSAs - The link between the transactions (Reg, Link, IOS) created in Vision and the address entry in the Personal Address Book of GP Communicator is the Health Link Mailbox set up in Organisations, Address, Communication Nos. and the reference entry on the Address Form in GPC, eg F0LDS for Leeds HA, F00BU for Bucks HA, and for Scotland, eg, F000C Argyll & Clyde. Messages may be in error with "Unknown Recipient".

- **Type of Contact Number** - At Type of Contact Number, click on to display the options and click on your selection - Telephone - Home, Fax, Telephone - Business, Mobile Phone, Pager, Telex, Email, Voicemail, Modem, Bleep number, HealthLink Mailbox, Emergency Number, Ex-directory, Relative, Carer.
- **Valid period** - Optionally enter dates for which the number is valid in From and Until.

2. Click on OK.
3. If you want to enter further numbers, click on Add Contact Number and repeat the steps above.
4. Finally, click on Close. The Organisation Details tab is re-displayed, with the main address now showing in the Main Address window.

Editing the main telephone number

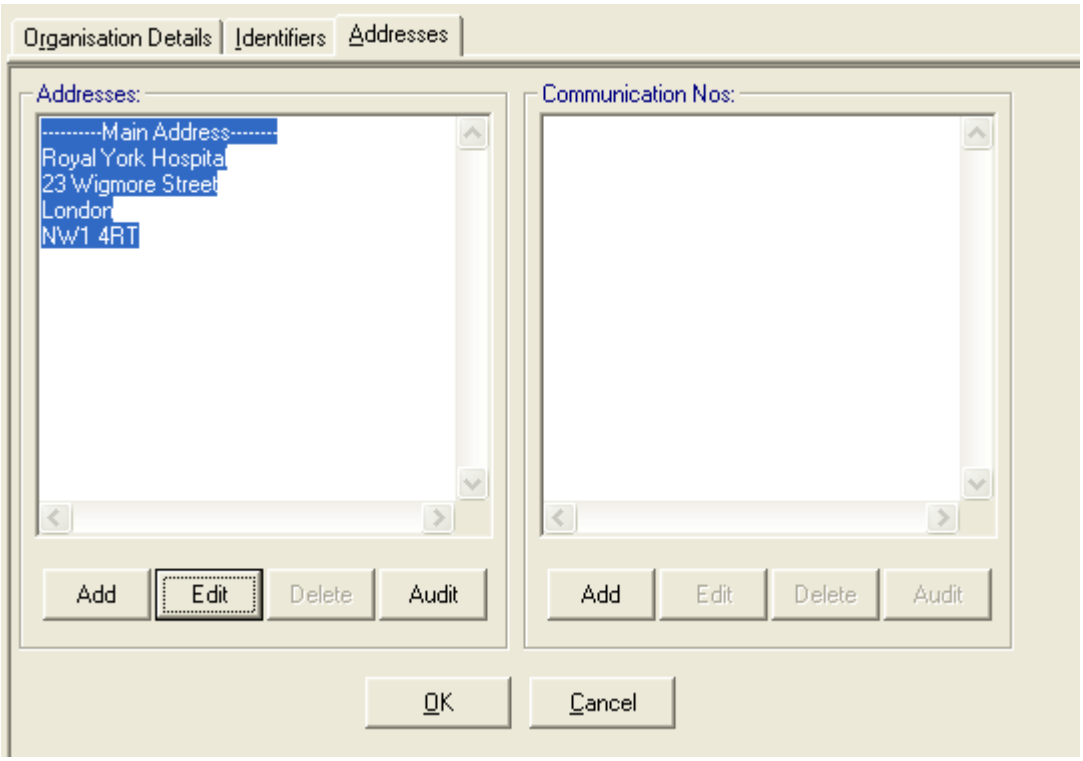
1. Select the organisation and click on Edit

.
2. Click within the phone number to highlight it, beneath Main Address on the Organisation Details screen.
3. Click on the Edit button beneath Main Address.
4. Make your amendment on the Communication Numbers - Update screen.
5. Click OK, then OK again.

Entering further addresses

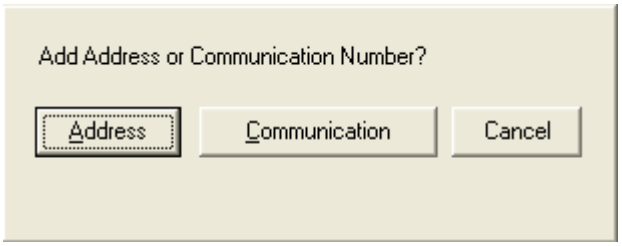
To enter a second address, or edit the main address, or enter further telephone / communication numbers, you can use the Addresses tab.

The left-hand frame shows the addresses and the right-hand, the communication numbers.



1. Click on Add or Edit under either Addresses or Communication Nos.

   If you select Add under Addresses and there is already a main address, the systems asks whether you are adding a further Address or Communication Number:

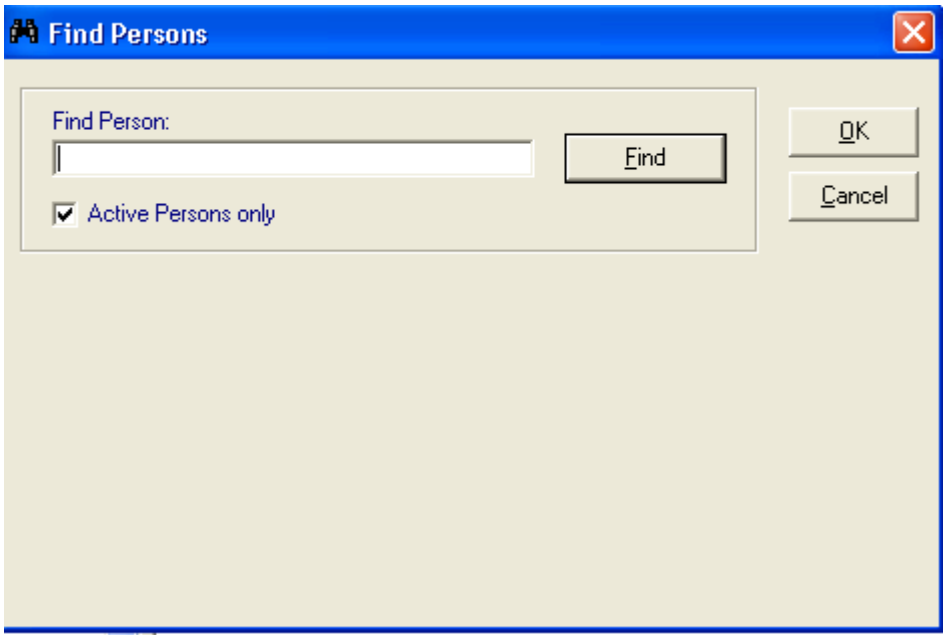


If you select Address, the Address entry - Add screen is displayed, as described above. If Communication, the Communication numbers - Add screen is displayed.

2. When you have finished your entries, click on OK.

Find Persons in Organisations

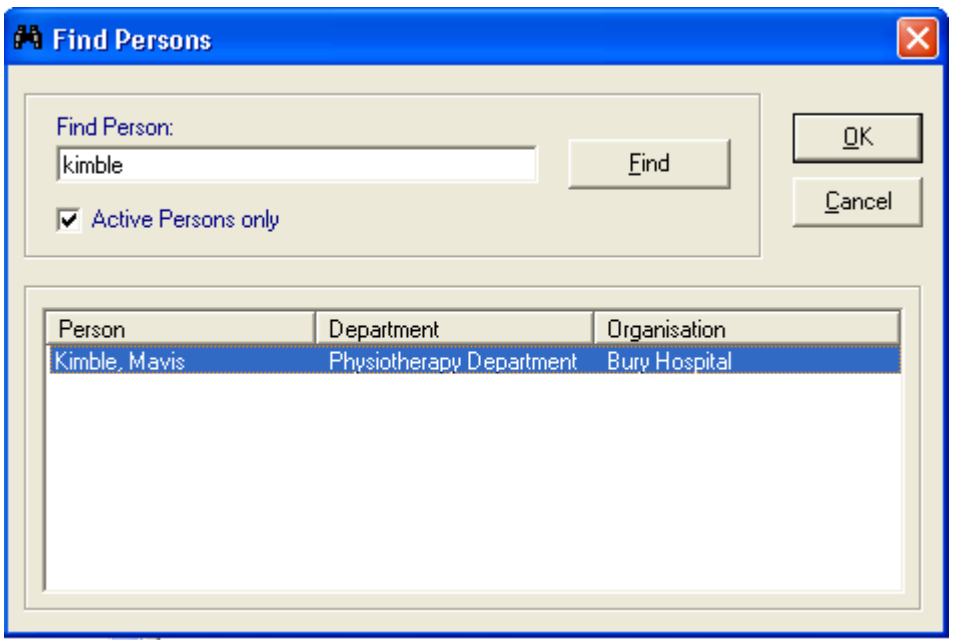
You can find a person added to any organisation using the Find Persons option from the Actions menu. This displays a Find Person screen.



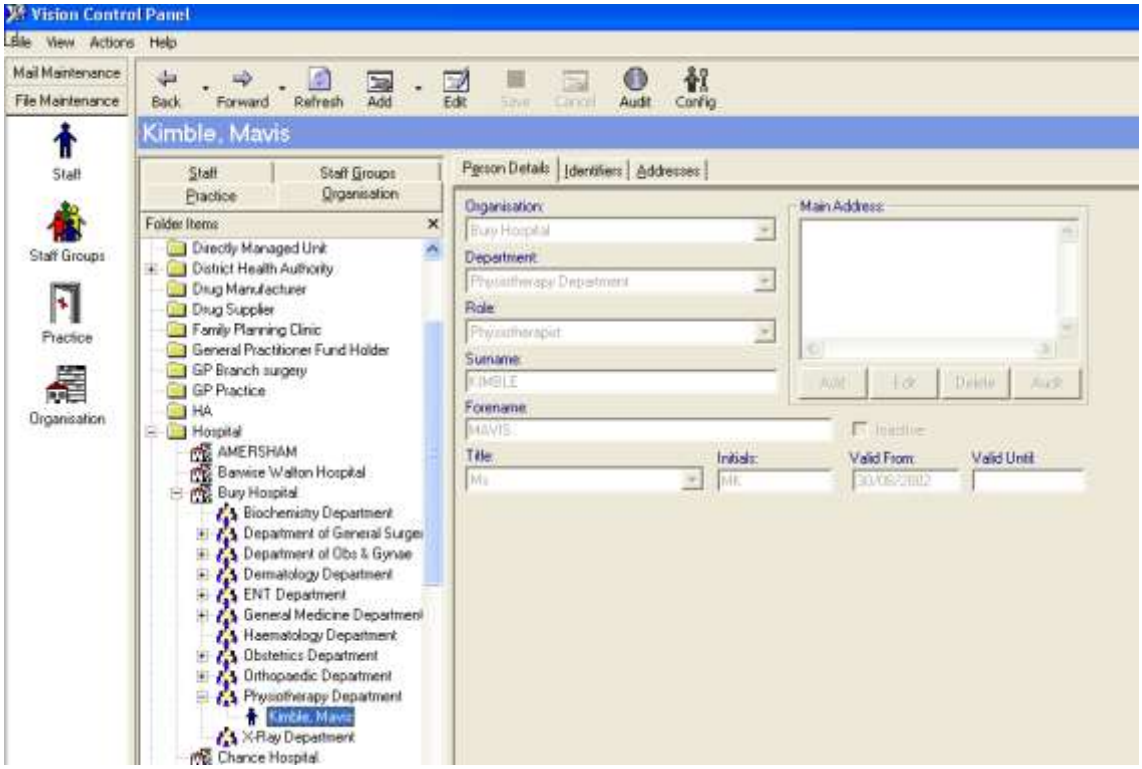
1. Enter the surname of the person you want to find and click on Find.

   If there is no person with that name, then there is the message: *No matching Persons found*.

   If that name is found within Organisations, the Organisations and department are shown.



2. When you click OK, the focus moves to that person within the Organisation list.



Codes – Quick Reference

The following table is a quick reference for various GP and organisation codes needed for the NHS.

Code and Validation Description	Format	Obtained from	Entered in
Clinical Commissioning Group Code (or NHS commissioning board Local Area Trust)	NNA (eg12A)	NHS Commissioning	File Maintenance - Organisations - CCG - Identifiers
Consultant Code	8 characters, C prefix followed by six numeric GMC code, plus check digit		
GMC Unique code given to each GP by GMC	7 numeric characters (may have leading 0)	HA.	Vision File Maintenance - Staff - Identifiers; and IOS
GMP code (England only) GMP code used by Path Lab as GP Identifier	7 characters – G then PPA code followed by check digit	From HA / Path Lab.	Vision File Maintenance - Staff
GP Code	GMC code, local GP code		
TP/HB/CSA GP Code (HA GP code) Unique GP code given by HA can be same for several HAs	Usually 3 or 4 alphanumeric characters	From each HA.	Vision and IOS
PPA No (England) Unique code given to each GP by PPA (see also GMP code)	6 numeric characters (same as GMP code minus first and last characters)	From HA/ PPA or from script pad	Vision (File Maintenance) and IOS
Prescribing number for doctors (Scotland only)	6 characters, the first being alphabetic	From HB	Vision File Maintenance - Staff
Prescribing number for nurses (England & Wales**)**	8 character, alphanumeric with format NNANNNNA, eg 12A3456B		
Prescribing number for nurses (Northern Ireland only)	Four digit numbers (pricing numbers)		

Code and Validation Description	Format	Obtained from	Entered in
Prescribing number for nurses (Scotland only)	5 character alphanumeric. First character is HB cipher, second two are unique identifier for the nurse, and last two identify the practice.		
Senior Partner code GP code for senior partner for that HA	Usually 3 or 4 alpha numeric characters	From GP code for senior partner entered in Vision and IOS.	Vision / IOS / GPC

Health Authority - see Strategic Health Authority			
Health Board - Northern Ireland	ZE0 Eastern Health and Social Services Board, ZN0 Northern, ZS0 Southern, ZW0 Western		
Health Board - Scotland	3 character version of the Health Board code (range SA9-SZ9).		
Healthlink Mailbox Identifier for Healthlink Mailbox checked against Reference code	5 alphanumeric characters (HA or HB cipher preceded by F then 1,2 or 3 zeros to make 5 characters), eg F00BU.	Extrapolated from HA cipher	Vision
Local health Board - Wales (replace Health Authorities in April 2003)	Q followed by W and 1-5 5 alpha numeric field with the first 3 characters identifying the LHB (eg Gwent QW1) and the fourth and fifth characters to be filled with zeros		
National identifier (important for exporting clinical audits to PCO). Also called the CRIR code	6 characters, letter followed by 5 digits	From HA	Vision (File Maintenance - Practice)
NHS Trust, England and Wales	R, A-9, A-9, followed by two blanks or zeros		

Primary Care Trust	5, A-9, A-9 followed by two blanks or zeros		
Provider, Northern Ireland *	Z 1,7 0-9 0-9 0-9 2nd character identifiers organisation. 1 = HSS Trust, 7 = Independent Provider		
Provider, Scotland **	S A-Z, A,C,D 0-9 0-9. The 2nd character identifies the Health Board. The third character A= Health Unit, C=Hospital Trust, D=Nursing Home		
Strategic Health Authority - England - Q code	Q followed by A-9 and A-9		See Strategic Health Authorities
Trading Partner Cipher HA Cipher unique to each HA	2 or 3 alpha characters. In England, for example, BD Bedfordshire, LNA City and East London, NEW Newcastle-upon-Tyne. In Scotland it is the single letter code, eg , L Lanarkshire, G for Greater Glasgow Health Board; and in Northern Ireland, NI	From HA	Vision (File Maintenance), IOS, GPC

CRIR code National Identifier (Practice code).	1 alpha then 5 numerics	From HA.	GPC – Clinical Address
Practice Edifact Link codes HA Edifact Link code for sending to HA	Usually 4 alphanumeric characters	From HA	GPC
Practice Edifact Link codes Path Lab Edifact Link code for sending to path lab	15 numeric characters (may have leading 0s)	HA / Path Lab	GPC
Qualifier Qualifier for Path Lab only precedes Edifact Link codes in transmissions	80 (for both Qualifier fields)	Will always be 80	GPC

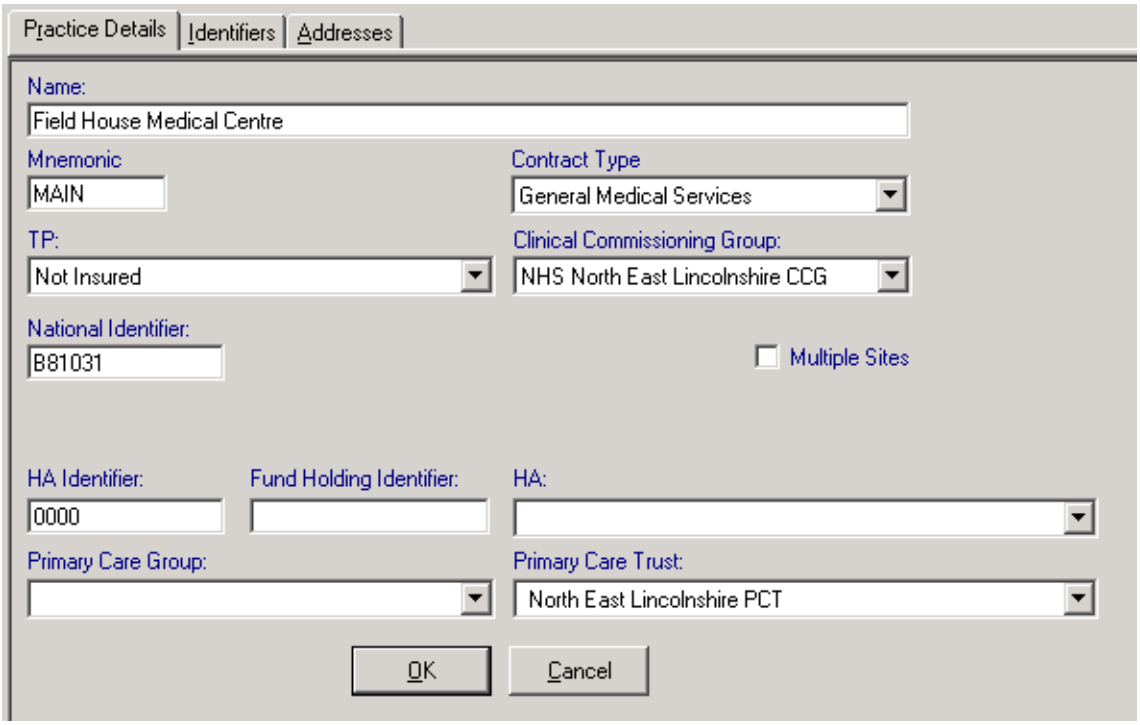
Reference code Reference code checked against HA Mailbox	5 alphanumeric characters (HA or HB cipher preceded by F then 1, 2 or 3 zeros to make 5 character code)	Extrapolated from HA cipher	Entered in Name field on GPC – Clinical Address, to populate Reference Code field
Sender Edifact Link codes HA Edifact Link code for receiving from HA	Usually 4 alphanumeric characters	From HA	GPC
Recipient Edifact Link codes Path Lab Edifact Link code for receiving from path lab	15 numeric characters (may have leading zeros)	HA / Path Lab	GPC

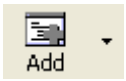
Practice

Main Surgery

1. Click on

or the Practice tab for the main Practice screen. If you have no branch surgery, there will only be one – the main surgery.



2. To add details, click on Add 

. Note - once you have entered details for the main surgery, right clicking and selecting Add Practice will let you add a branch surgery.

   - **Name**- The surgery name, the main surgery, which will be used on printed prescriptions.
   - **Mnemonic**- Enter any short name for the surgery, for example, MAIN for the main surgery, RUSS for a surgery at Russell Street.
   - **Contract Type** – The default is GMS (General Medical Services). Change if relevant to PMS if Personal Medical Services.
   - **TP/HB/CSA** - This entry is only made on the Main Surgery screen. Using , select your responsible Health Authority (to whom you are linked), Health Board or CSA, depending on your country.
   - **Clinical Commissioning Group (England) -** This can be selected for entry, as long as you have entered the CCG beforehand, with its code, in Organisations. These details are printed on all English prescriptions**.**
   - **National Identifier** - This entry is only made on the Main Surgery screen. This is a nationally recognised identifier for the practice and is

also called the Practice Code. It has six characters - 1 alpha and 5 numeric and often forms part of your practice's NHSNet email address. Contact your Health Board if you are not sure about this or look on the NACS website http://www.nhs.uk/nacs/. This is an essential code to have entered for GMS contract audit data to be reported to QMAS.

- **Multiple Sites** - This prompt is only on the Main Surgery screen. If ticked, then a branch surgery may be added.
- **HA Identifier** - This entry is only made on the Main Surgery screen and can either be left blank, or enter the five character HA code which identifies the practice. The cipher is usually made up of a two/three digit code plus the HA/HB/CSA cipher, eg F00NO for Northampton, F0LNR for Croydon.
- **Fund Holding Identifier** - This entry can only be made on the Main Surgery screen.
- **HA** (previously called New HA) – England and Wales only. This is your responsible Health Authority.
- **Primary Care Group**
- **Primary Care Trust**: This can be selected for entry, as long as you have entered the PCT beforehand, with its code, in Organisations. In Wales only, as long as the PCT is selected here in Practice Details, then Vision will automatically pick up the PCT's details and print it on the prescriptions, along with the PCT code that is set up in the "Identifier" tab. If the Identifier is not set up on the PCT under Organisations, then the PCT code will not print on the script.

If the PCT or CCG is not set up in Practice Details, Vision will continue to print the Health Authority details on the scripts. If this is blank, then the TP will be printed.

3. Click on the **Addresses** tab, then **Add** under **Main**. Each Practice site should only have one address. Another address implies another practice site and a separate practice (branch) must be entered.
4. When you click OK, then click on Add Contact Number and enter the practice's main telephone number in Address – Communication Nos. – Add - Telephone - business. This number appears on the prescription form.
5. Click on **Close**.
6. Numbers listed under Communication Nos are supplementary, for example, other practice phone numbers, fax, mobiles, emergency number, etc. Click on Add under Communication Nos. Complete the screen, then OK.
7. Click **OK**.

Edit details of the Main Surgery

1. In Control Panel, select File Maintenance.
2. Click on

or the Practice tab.
3. The main surgery name should be highlighted. Either right click while pointing to the item to be amended and select Edit Practice; Or click on the Edit icon

.

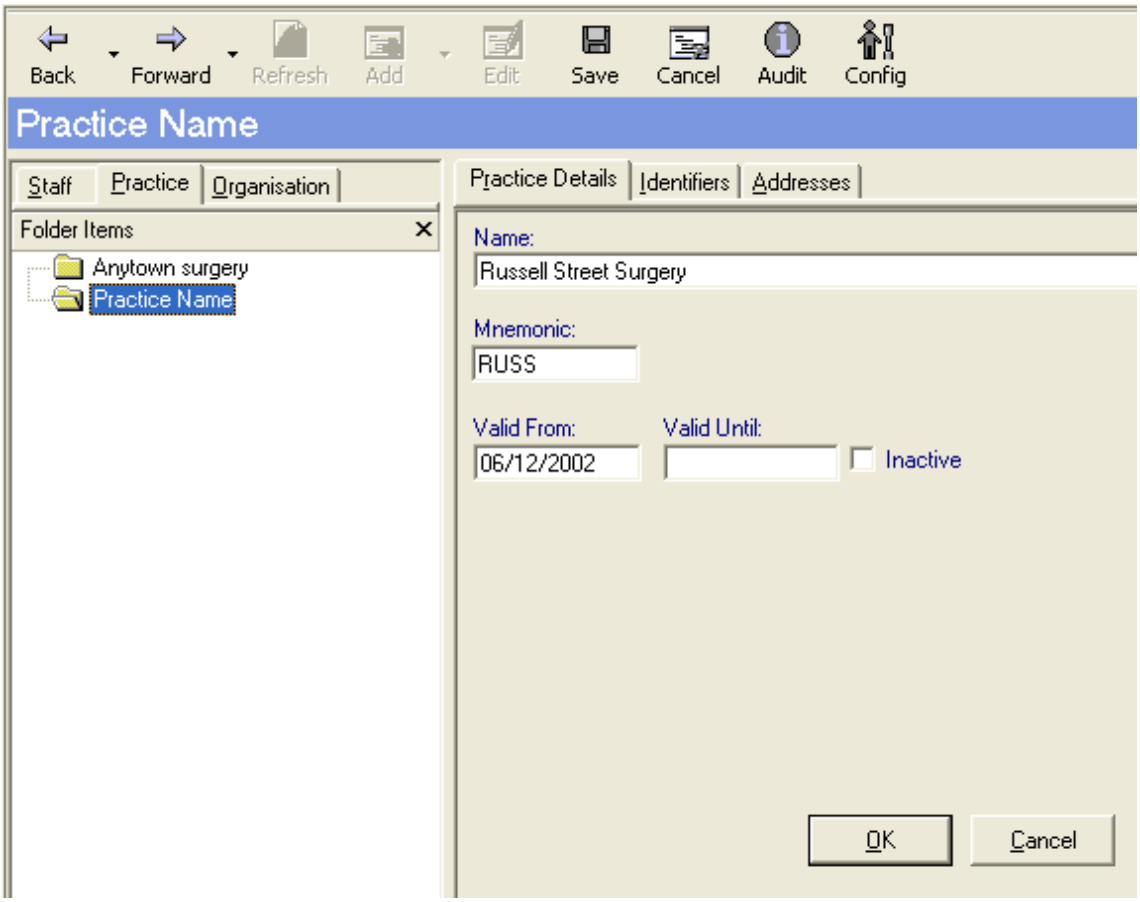
   - If the amendment is to be made on the Practice Details screen, make the correction then click OK.
   - If the amendment is to be made to the practice's main telephone number, click on the Addresses tab. Highlight the line with the phone number *Bus. [number]* listed under the Main Address. Then click on Edit under Main Address. Amend the number then click on OK.
   - If the amendment is to be made to the practice's address, click on the Addresses tab. The main address should already be highlighted. Click on the Edit button beneath Main Address. Make the correction. Click OK.
   - If the amendment is to be made to the supplementary contact numbers, click on the Addresses tab, then click on Edit under Communication Nos. Numbers listed under Communication Nos are supplementary, for example, phone numbers other than the main practice phone number, fax, mobiles, emergency number, etc.

Branch Surgery

1. In order to enter a branch surgery, first edit the main Practice screen and tick the Multiple Sites box.

2. Then click on

. Type in a Name and Mnemonic. Click on Addresses and add the branch surgery address. Click OK.



Staff

What staff should be entered?

Enter the details of practice staff in Staff, ie those employed by or attached to the practice including:

- the GPs (see *Add GPs and doctors* (page 56)) including senior partner, partners, salaried GPs, GP registrars, locums, GP retainer, Assistant, Associate. If the practice has no partners but only salaried GPs, one salaried GP should be designated as senior partner.
- nurses (see *Add Nurses* (page 69))
- administrative staff (see *Add Non-medical staff in the practice* (page 78))
- and the attached community and other staff (see *Add other medical staff in the practice* (page 78)).

Staff which are external to the practice, such as consultants at the local hospital, or a social worker from the local Social Services, are held on the Organisations file, under Person (see *Add a Consultant to a Hospital Department* (page 30)).

> **Note** - that if staff are added who are also computer users, you must enter details in Control Panel - Security (see Add or Edit User and Passwords). The normal Staff -Add process in Control Panel - File Maintenance automatically leads on to the Add user screens in Security. These include their login names and passwords, and the default display and selections from the Drug and READ dictionaries. You can then allocate users to groups (system managers, clinical managers etc) to determine their access to either clinical or non-clinical data.

For each member of staff, you can enter:

- personal details (name, date of birth);
- professional details (eg role within the practice, eg partner, physiotherapist, administrator), specialty interests, HA lists such as the maternity, CHS, minor surgery or contraceptive services lists;
- identifiers - for GPs, particularly the TP/HB/CSA codes (ie the GP Code), and GMC and GMP codes;
- addresses and contact numbers.

> **Note** - it is mandatory for each GP record to have at least one GP code for a local TP/HB/CSA entered in Staff Identifiers.

Staff Ids (Short Name) and User IDs

All internal **staff** (ie part of or employed by the practice) should be added in Staff, and classified with their practice role.

Staff ID's are used for audit purposes. This does not necessarily mean the staff member uses the computer.

A **user** is defined as a staff member who uses the computer. They are added in File Maintenance - Staff and then given a user ID and password in Security so they can sign on to Vision. User IDs are needed for users of the computer when logging on, in addition to a Staff ID. The User ID and password is entered in Control Panel -

Security. A member of staff may have more than one user profile, for instance, a GP may act as system administrator for administrative tasks, and as a clinician to add clinical data.

List existing staff

1. Click on Staff or the Staff tab to list existing staff.
2. Staff are listed under Active and Inactive. Inactive staff are those with a tick in the Inactive box on the Staff Details screen.

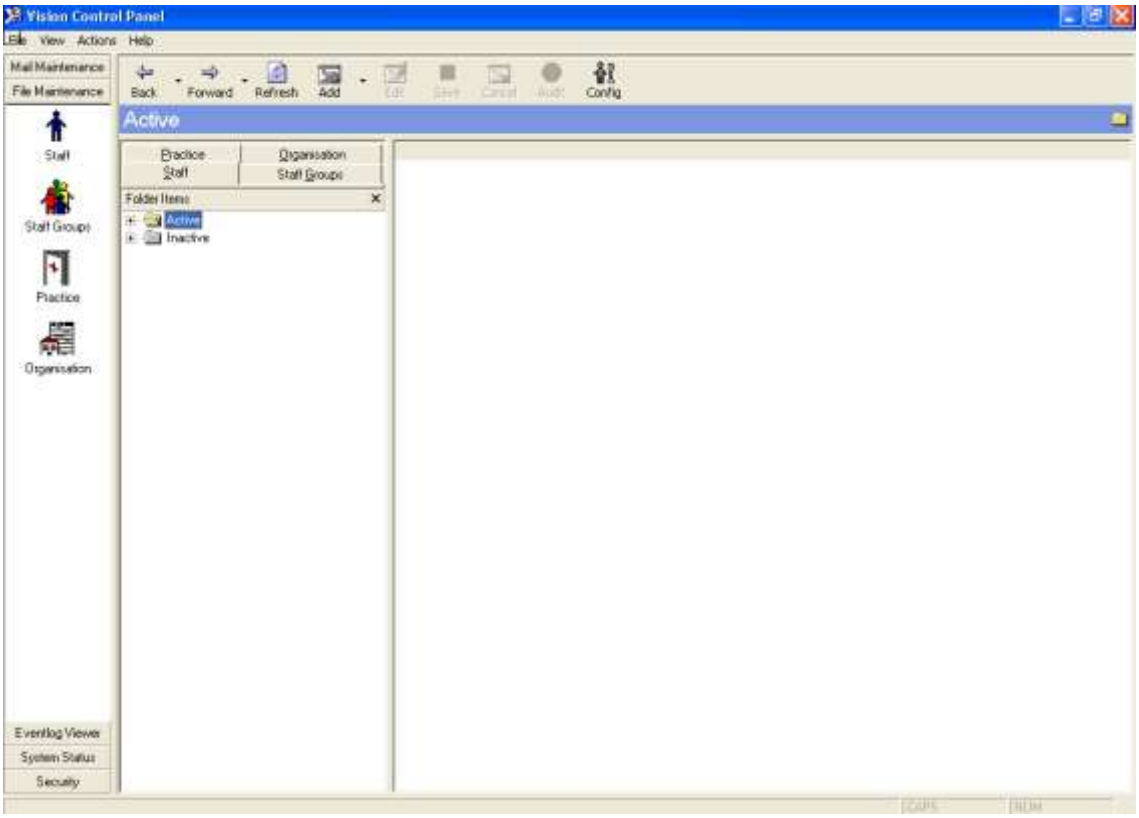
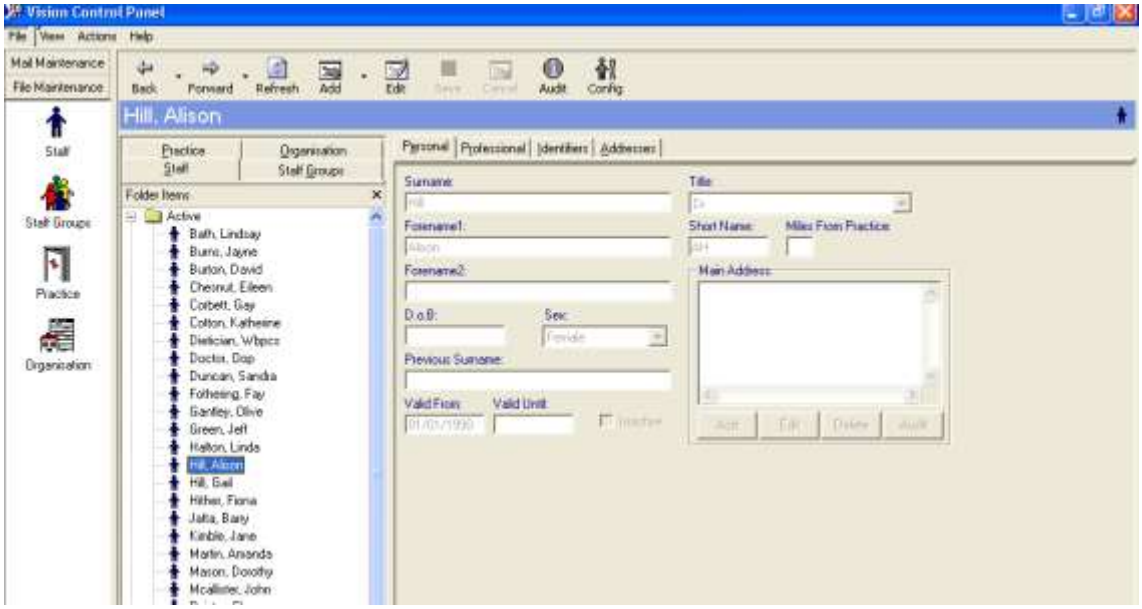


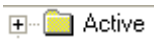
Figure 4: This is how Control Panel looks after Mail Manager/Maintenance is switched on - new Mail Maintenance module and in File Maintenance, there is an extra section called Staff Groups

3. Expand the list of active staff by clicking on

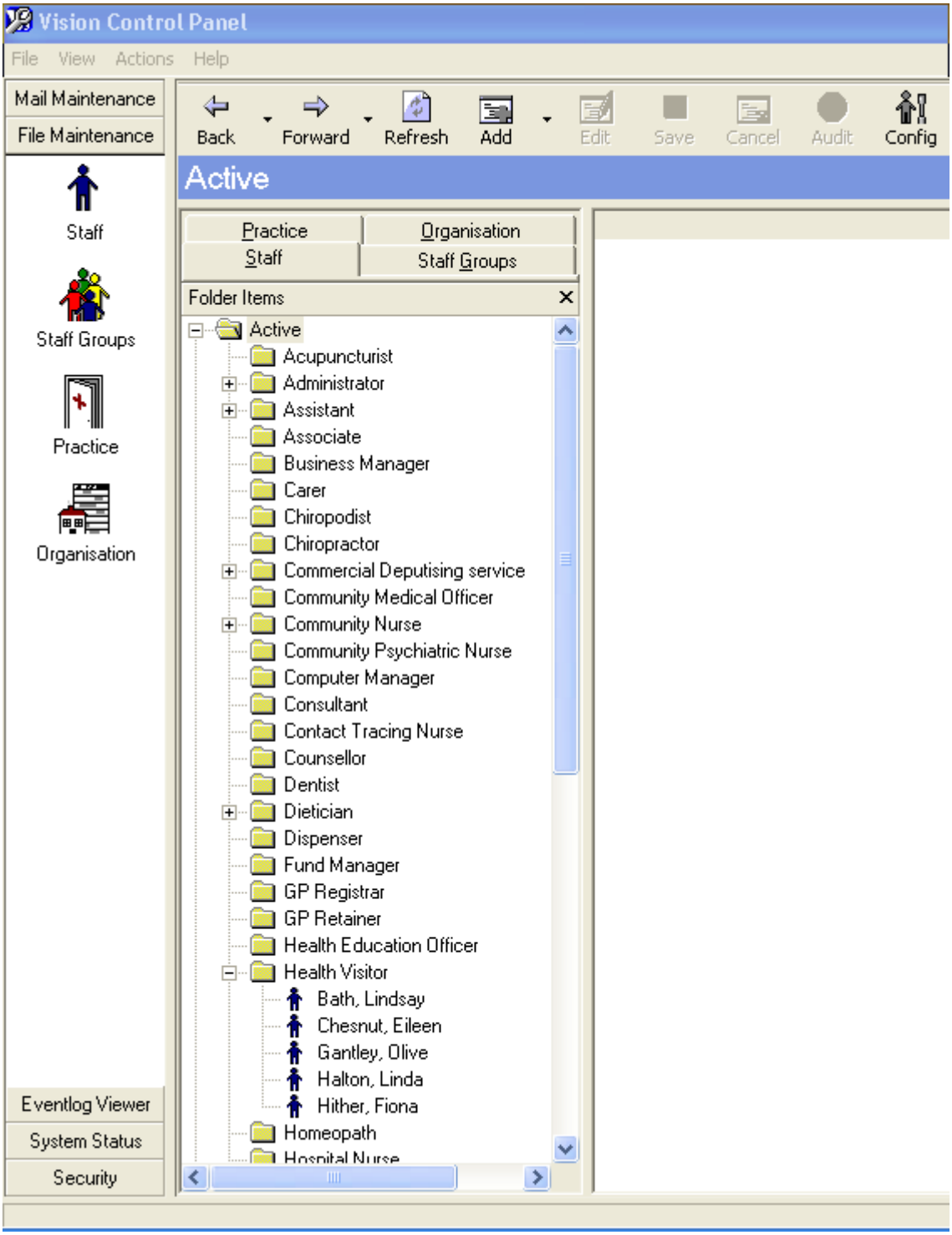
.



4. As you click on each staff name, their details are shown in the right-hand pane.

5. If you right click while pointing at 

, you can select to display the staff by role.

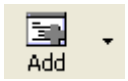


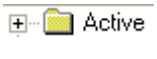
GPs are shown under Partner. Each Staff screen has four tabs: Personal, Professional, Identifiers and Addresses (including contact numbers).

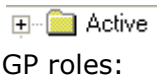
Add GPs and doctors

1. In Control Panel, select File Maintenance.

2. Click on Staff or the Staff tab to list existing staff.
3. To add a staff member:

   - Either click on the Add icon 

   - Or right click while pointing to 

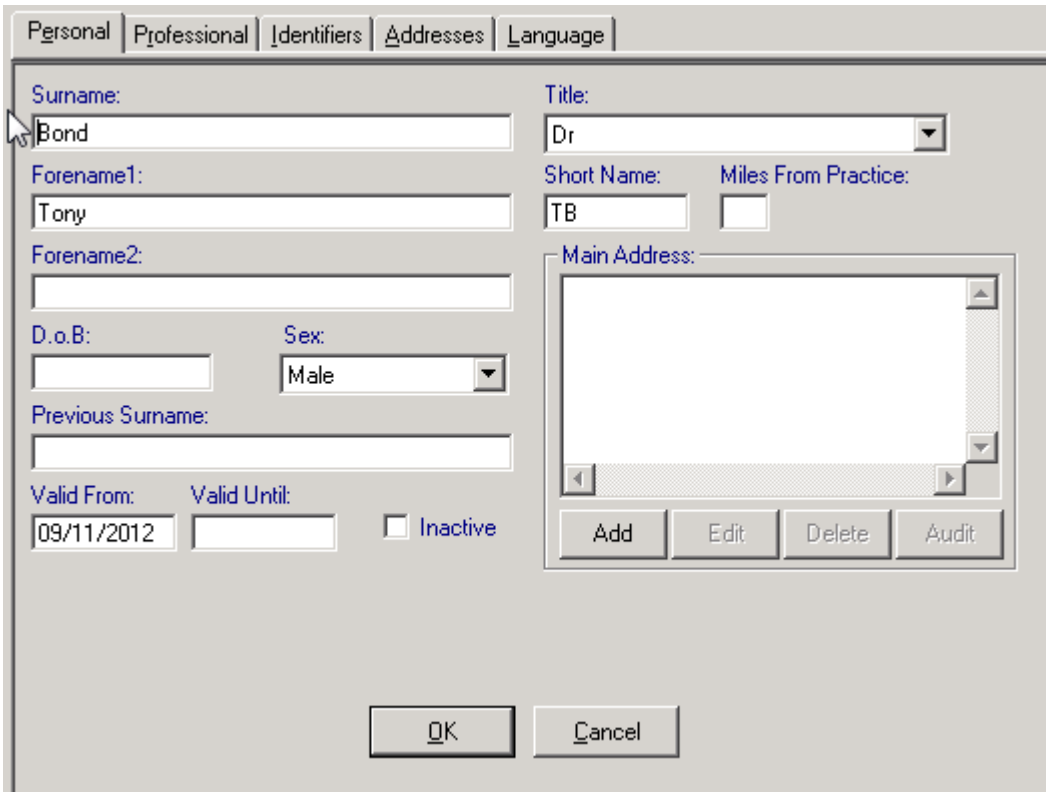
 and select Add Staff.
   - Right click on 

 and select Display by Role. Then right click on one of the GP roles:
   - Partner, Senior partner, Salaried Partner, GP Registrar, GP Retainer, Assistant, Associate, Locum - and select **Add Staff**.

> **Note** - Practices without partners or senior partners are becoming more commonplace, with some practices only having salaried GPs. Officially, salaried GPs have their own prescribing number and as far as the PPA is concerned, each salaried GP is treated as a partner in the practice. One of the salaried GPs should be specified as the senior partner (decided by the practice).

Staff - Personal tab

This displays the Personal tab.

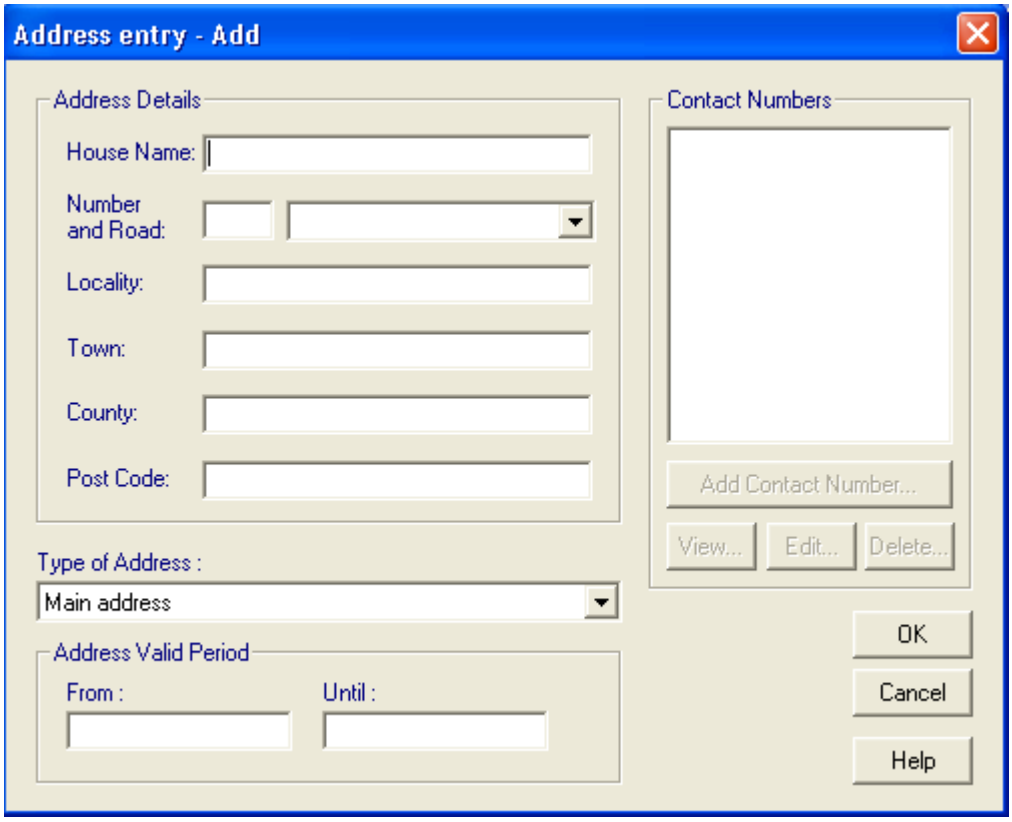


1. Enter at least the **Surname** and **Forename 1** (up to 30 characters). Use upper and lower case.
2. Select Dr in **Title** (Title is a mandatory entry).
3. Optional are Forename 2, Date of birth, Sex, Previous Surname.
4. **Short Name** - This is a mandatory entry, up to 5 characters, and is a short way to identify this staff member.
5. **Miles from practice** - An optional entry for travel expenses, to record the number of miles the staff member is from the practice. Leave blank rather than entering zero.
6. **Inactive**- Leave Inactive unchecked for current partners. If *Inactive* is ticked, then the doctor is no longer active, and will no longer appear on selection lists of active users. Any historical records will still bear the initials of a former GP for audit purposes. For example, a GP registrar leaving the practice may be made *Inactive* (see *Inactivating a user* (page 87)).

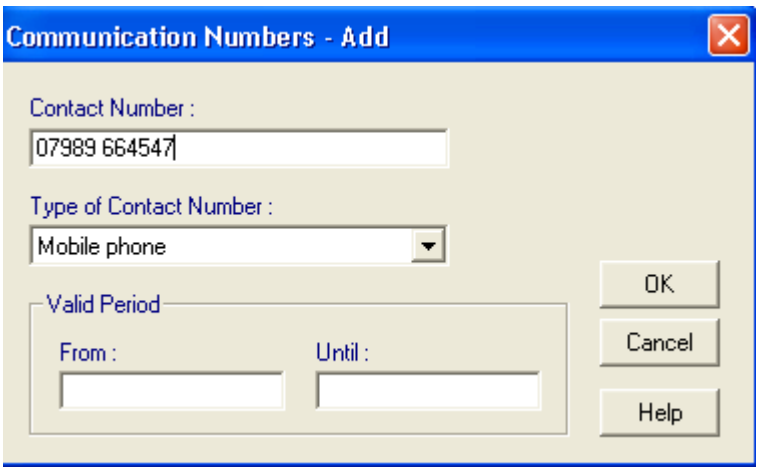
Staff - Address

1. **The main address and phone numbers** of the doctor can be entered by clicking on **Add** under the **Main Address** window on the **Personal** tab. (Any other addresses for that GP can be entered from the Addresses tab).
2. Entering a GP's home address is optional. In Main Address, enter free text for House Name, Locality, Town County.
3. Use the Tab key to move from field to field (or Shift-Tab to move to a previous entry.
4. In Road, you can type the first letter of the road then click on and select from a picklist of roads already in Vision. If not there, type in free text.
5. The Town field must be filled.

6. Postcode is up to 8 characters including the space following a valid postcode format.



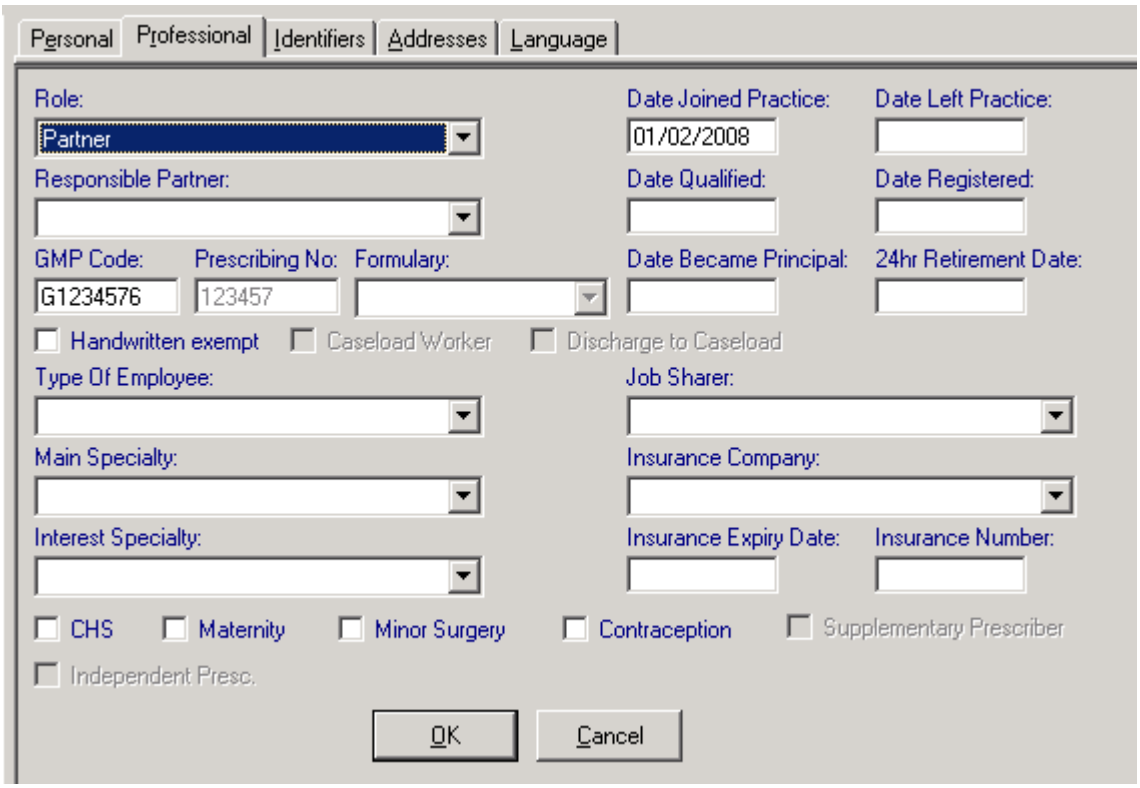
7. Click OK when you have entered the address (or when you have entered at least Town) which then enables **Add Contact Number**. This is the GP's home phone number
8. Click on **Add Contact Number**. Enter the contact number, and choose the Type of contact Number: Telephone - home.



9. Click OK.
10. Click Close to return to the Staff - Personal screen.

Staff – Professional – for a GP

1. Click on the **Professional** tab. The mandatory entries on the **Professional** tab are *Role, Type of Employee,* and the *Prescriber No*. / GMP code for GPs.



2. **Role** – This is mandatory entry. For more about staff roles, see *Staff Roles* (page 82).

   For a GP in your practice, select one of the following: Partner, Salaried Partner, Senior Partner, Assistant, Associate, GP Registrar, GP Assistant, Locum, Salaried Partner. You can also enter Non-commercial local rota of less than ten GPs or Commercial Deputising service.

   Any of the above entries classifies the person as a clinician. A role of Partner, Senior Partner or Sole Practitioner qualifies the staff as a prescriber and a principal. This has a significance in data entry within Consultation Manager and IOS claims.

3. **Responsible Partner -** If the role selected is either GP Registrar, GP Retainer, Locum, Assistant, Associate (or Non-commercial local rota of less than ten GPs or Commercial Deputising service), select the senior GP partner responsible, ie the trainer of a GP registrar, or assistant's responsible GP. This has a significance for printed prescriptions.

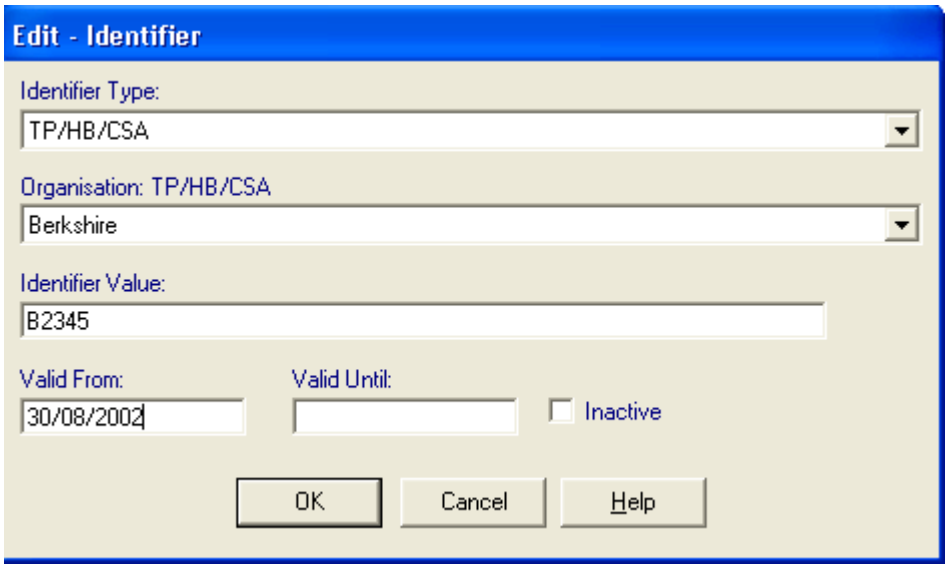
4. **England and Wales -GMP Code / Prescribing No -** Enter the GP's GMP code, essential for prescribing. The **GMP Code** is 8 characters (the six numeric PPA number preceded by G plus a last check digit and unique for each GP). For instance if the PPA number if 345654, the GMP Code may be G3456549. The PPA number is no longer entered directly. The PPA number appears on prescriptions. For Locums, GP Registrars, and GP Retainers, the GMP code is that of the Responsible Partner.

5. **Scotland and Northern Ireland** - **Prescribing No -** Enter the GP's 6 digit PPA number, essential for prescribing. The PPA number appears on prescriptions.

6. **Hand-written exempt** - If this option is checked, then the HA/Health Board/CSA allow the GP to issue printed, computerised prescriptions for controlled drugs, rather than having to hand-write them.
7. **Type of Employee** - Select from 1/2 Time, 3/4 time, Agency, Contract, Full Time, Job Sharing, Part-Time.
8. **Main Speciality** - Optionally, select the main speciality in which the GP is interested (see *NHS Specialities* (page 85))
9. **Interest Speciality** - Optionally, display the options and select an interest speciality. The list from which to choose is the same as Main Speciality.
10. **Dates Joined and left Practice** - Enter the date the staff member joined the practice. Once a GP has retired, left or died, enter a date In Date Left Practice, but leave blank if not yet relevant.
11. **Date Qualified** – Optionally, for GPs only, enter the date qualified from medical school.
12. **Date Registered** – Optionally, for GPs only, enter the date the GP registered with the General Medical Council, usually a year after qualifying.
13. **Date Became Principal** – Optionally, for GPs only, enter the date the GP first joined general practice as a principal (not necessarily this present practice).
14. **Date of 24 hour retirement** - For GPs only, enter the date for 24 hour retirement. On Items of Service claims, no claim is allowed to be made by a claiming GP on the date of a 24 hour retirement.
15. **Job Sharer** - If the staff member is job sharing, display a list of other staff members, and click on the member of staff with whom the currently staff member is sharing a post.
16. **Insurance Company, Expiry Date, Insurance No** - An optional entry - display the options and click on your selection from *Organisations* already entered (if you have not already done, this, you can return and edit this entry later). Enter the *Insurance Ref. No* and *Insurance Expiry Date.* For example, Medical Defence Union.
17. **CHS, Maternity, Contraception, Minor Surgery** - Now that Items of Service has been discontinued (since April 2004) this is no longer relevant. For GPs only, you could check the boxes where a GP was on the approved local Health Authority lists. Where a box was left unticked, that GP would not be able to be the claiming GP on any Items of Service claim.
18. **DXS** - When editing or adding a doctor or nurse, tick the DXS box under Staff - Professional to switch DXS on or off (see DXS Bulk Update). If on, the user's details will automatically be exported to DXS and s/he should be able to see the DXS banners and button(s) in Consultation Manager.
19. That completes the Staff Professional tab. Click on the *Staff Identifiers – for a GP* (page **62**) tab, particularly for GPs to enter the local health authority code.

Staff Identifiers – for a GP

1. Click on the **Identifiers** tab (or Alt-C, I). The GP and GMC codes **must** be entered for each GP. Click on Add and enter each code in turn:



- **GP Code** - Each GP must have local **GP Code** entered. **Identifier Type** is TP/HB/CSA. **Organisation** is the specific health authority name selected from a picklist. **Identifier Value** is the 3 or 4 alphanumeric code unique for each GP and given by the HA (though the code can be the same for several HAs). **Valid From** (defaults to today's date) is mandatory. There must be a separate GP code for **each** TP with which you have registered patients. So if your practice borders Buckinghamshire and Oxfordshire, enter a code for Bucks and one for Oxon. This code is also entered in IOS – Practitioners.

- **GMC code** – Each GP must also have a unique **GMC code** entered in Identifiers. **Identifier Type** is GMC code. **Organisation** is left blank. **Identifier Value** is the 7 numeric characters (it may have a leading 0), unique for each GP by the GMC, and obtainable from the HA. Both the GMC code and the GP code are essential for Registration Links and prescribing for ePharmacy. An exception is made for locums, registrars and GP retainers in Scotland where, if there is no GMC code entered, the GMC code of the Responsible Partner is used, so they can prescribe under ePharmacy.

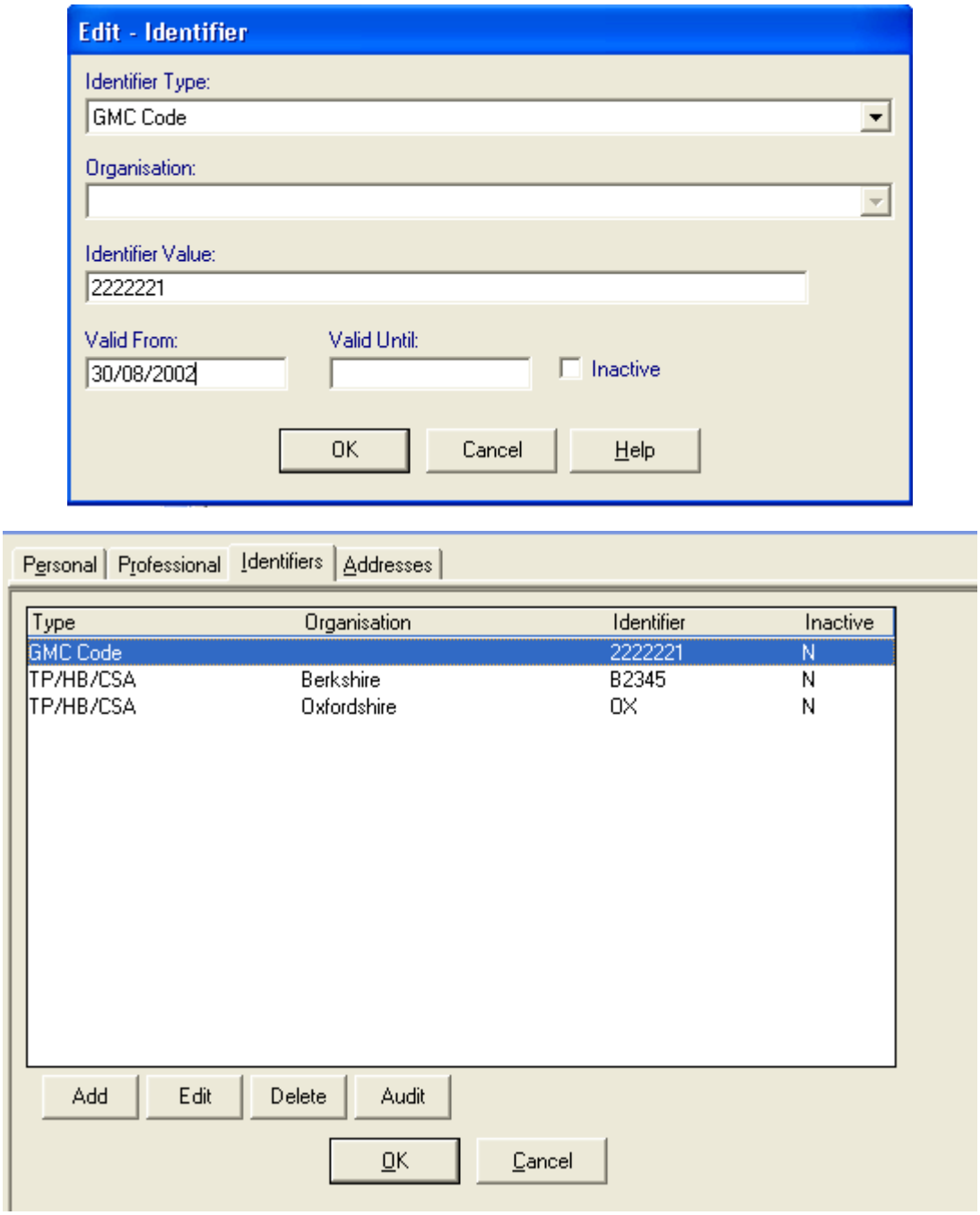


Figure 5: The codes that should be entered for a GP

- **Private Controlled Drug Code** - This is essential if the doctor is to issue private controlled drug prescriptions. Enter in Identifiers, selecting the relevant Identifier Type of either the PCD code in England,

which has the format 6AAAAA (eg 6ABCDE); or the IPC code in Wales PNNNNNN, eg P123456.

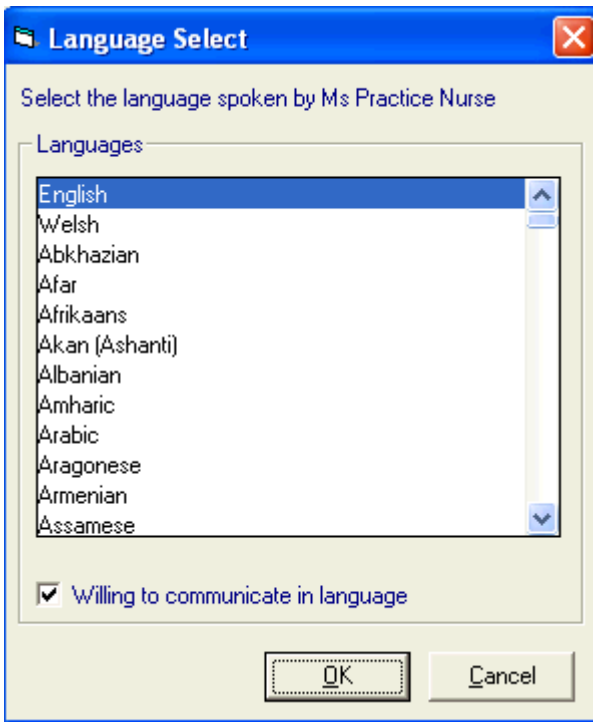
Other addresses or contact numbers

1. Any supplementary contact numbers can be added from the Addresses tab. Click on Add under Communication Nos and select from the following:
   - Fax, Telephone - business, Mobile phone, Pager, Telex, Email, Voicemail, Modem, Bleep number, Emergency number, Ex-directory, Relative, Carer.
2. Click OK, then OK again to return to the Staff - Personal screen.

Staff - Language Tab

The Language tab in the File Maintenance – Staff allows you to record the spoken, written and reading language abilities of your staff.

1. From **Management Tools** - **Control Panel**, select **File Maintenance**.
2. Click on the staff icon or the Staff tab to list existing staff.
3. To Edit an entry:
   - Either right click while pointing to the member of staff's name and select **Edit Staff**;
   - Or click on the staff member to be amended and click on the **Edit** icon.
4. Click on the **Language** tab.
5. The three tabs available are Spoken Language, Written Language and Read Language. Choose the one required and select **Add**.
6. A list of languages is displayed, scroll to find the one you want or press the first letter of the language required.
7. Highlight the language and if applicable, tick the box **Willing to communicate in language**.



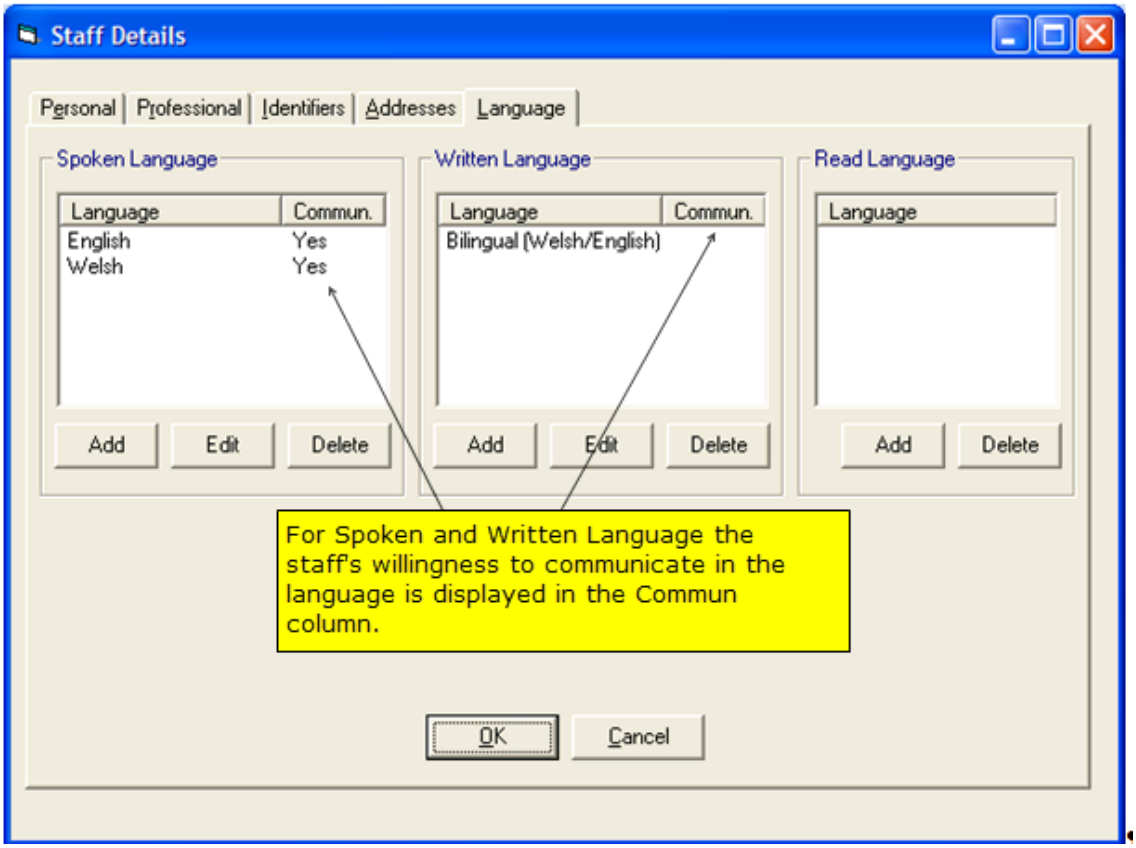
Language Select - England, Northern Ireland and Scotland

Language Select - Wales

Note - For practices in Wales the first option in the list is Bilingual (Welsh/English).

8. To save the selection click **OK**.

9. To exit the Staff Language tab, click **OK.**



Staff Languages

Note - For each language type (eg spoken, written or read), multiple languages can be recorded, but you cannot add the same language to the same type multiple times.

To Delete a Language Preference

To delete an entry that has been recorded under Language spoken, written or read, highlight the entry and select the **Delete** button.

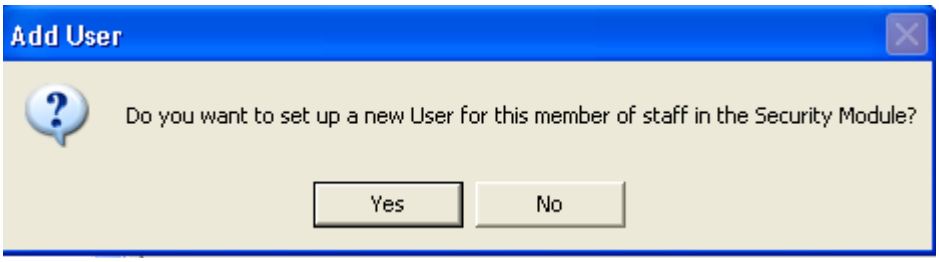
You are warned that the entry is about to be deleted - click **Yes** to confirm the deletion. To exit the Staff Language tab, click **OK**.

See also *Staff Languages - Reporting* (page 159).

Saving the details and adding a new user in Security

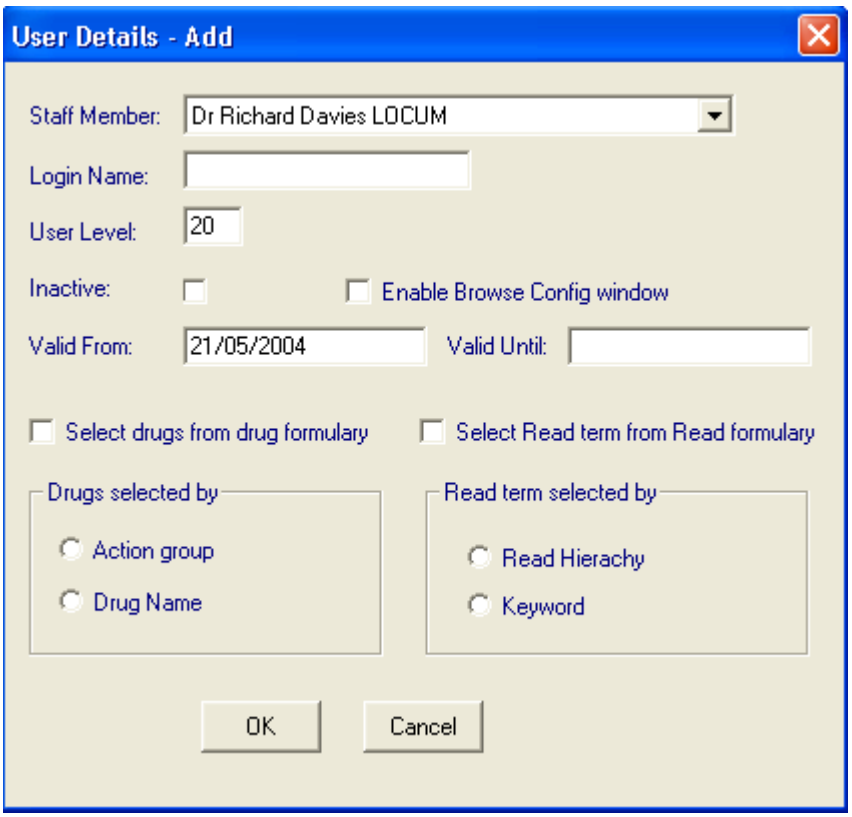
1. Finally, click OK to save all the entries you have made.

   You will be asked: *Do you want to set up a new User for this member of staff in the Security module?*



2. If the new doctor is to use Vision on the computer, then they must be given a Login name and password - answer **Yes**. Only answer No if the doctor is never likely to use Vision.

   The **User Details - Add** screen is shown within the **Security** module.



Login Name - This is a short name used as a User-ID for computer use of Vision. A login name belongs to a user. Up to 20 characters.

User Level - This is not currently in use.

Inactive - Leave unchecked if the doctor is a current member of staff. Inactive should only be checked once a staff member is no longer active within the practice. They will no longer be able to gain access to Vision.

Valid From and Valid Until - Enter a Valid From date, from when the user is valid to use the computer. You can leave Valid Until blank if open-ended.

Enable Browse config window - If this option is checked, then on Select Patient browse lists, and in Consultation Manager classic view browse lists, such as Therapy lists and List-Contraception, you can double click on the small square to the left of the column headers to add or remove details to be included in the browse lists.

Default Displays: The following are default displays that will take effect when this user is signed on - these can be left blank:

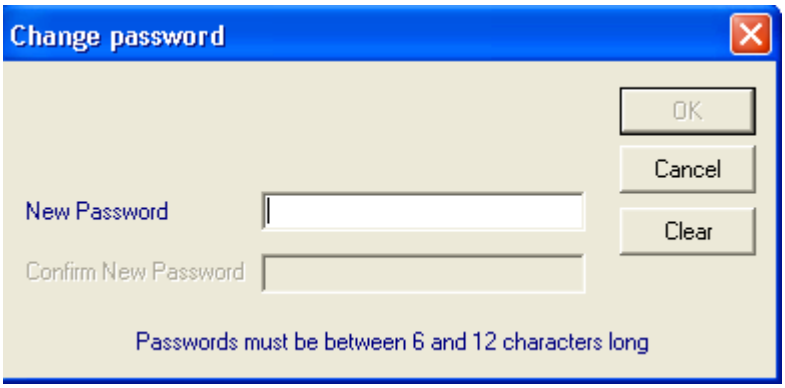
- **Select Drugs from Drug Formulary** - While using Therapy in Consultation Manager, and selecting drugs in Therapy Add, either the full Drug Dictionary or the practice-defined Formulary is displayed first. You can switch between the two at the time of selection in Therapy. Many prefer a locum or GP Registrar to select from the Formulary by default.
- **Select READ from READ Formulary** - In Consultation Manager, when displaying the READ dictionary to select a READ term, either the

full READ Dictionary or the practice-defined READ Formulary is displayed first. It is possible to switch between the two at the time of selection.

- **Drug Selected By** - Choose the ways you display the drugs dictionary or formulary - either by drug class, or alphabetically by Drug Name. This becomes the default display for the user when select therapy items in Therapy Add. It is possible to switch between the two at the time of selection.
- **Read Selected By** - Choose either READ Hierarchy (ie by code) or Keyword as the default way this user will select items from the READ Dictionary. You can switch between the two at the time of selection.

3. Click on OK to save the entries.

   For a new user, this displays the Change Password screen. Each computer user needs a password in order to sign on to Vision, though you need to warn the new user that the password you are about to enter now will have to be changed by them the first time they sign on.



4. **New password** - Type in a password, between six and twelve characters long. Note - nothing will show on screen as you type, not even asterisks. **At least one character must be non-alphabetic.** Press the Tab key to move on a field.
5. **Confirm New password** - Retype the password in exactly the same way.

> **Note** - when changing passwords, a password cannot be repeated until five other dissimilar passwords have been used. In other words, you can re-use the same password once every six times

6. Click on OK, or press Enter.

   You are returned to the File Maintenance Staff list.

7. Further options with regards passwords are explained in Security Settings, including the expiry interval, minimum length, a global expiry date, and number of login retries.

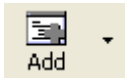
Add Nurses

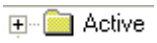
Enter the nurses employed or attached to your practice. Some nurses are now allowed to prescribe and print prescriptions. While adding a nurse's details, you can specify whether they carry out nurse prescribing, and from which formulary. All nurses can enter their NMC PIN in Identifiers.

There are currently two forms of nurse prescribers:

- **Community Practitioner Nurse Prescribers** who can only prescribe dressings, appliances and licensed medicines listed in the Nurse Prescribers Formulary for Nurse Practitioners, known as the Nurse Formulary in Vision.
- **Independent/Supplementary Prescribers** (abbreviated to IPs and SPs) - From May 2006 supplementary prescribers and independent prescribers are no longer different types of prescribers. They are now both known as Independent/Supplementary Prescribers. The need for prescribing from the extended nurse formulary is no longer relevant as Independent/Supplementary Prescribers can prescribe any drug other than controlled drugs.

1. In Control Panel, select File Maintenance.
2. Click on

or the Staff tab to list existing staff.
3. To add a nurse:
   - Either click on the Add icon 

   - Or right click while pointing to 

and select Add Staff.
   - Right click on

and select Display by Role. Then right click on one of the nurse roles - Practice Nurse, Health Visitor, Community Nurse, Midwife, Community Psychiatric Nurse, Hospital Nurse, School Nurse, Mental Handicap Nurse - - and select Add Staff.
4. Complete the **Staff - Personal** screen with Name Forename, Title and Short name.
5. Enter at least the **Surname** and **Forename 1** (up to 30 characters).
6. Select Miss, Mrs or Sister if female in **Title** (Title is a mandatory entry).
7. Optional are Forename 2, Date of birth, Sex, Previous Surname.
8. **Short Name** - This is a mandatory entry, up to 5 characters, and is a short way to identify this nurse. It must be unique.
9. **Miles from practice** - An optional entry for travel expenses, to record the number of miles the staff member is from the practice. Leave blank rather than entering zero.
10. **Inactive**- Leave Inactive unchecked for current nurses. If *Inactive* is ticked, then the doctor is no longer active, and will no longer appear on selection lists of active users. Any historical records will still bear the initials of a former GP for audit purposes. For example, a GP registrar leaving the practice may be made *Inactive.*
11. On the **Staff - Professional** screen,
    - **Role** - Select one of the nurse roles listed below:

– Practice Nurse, Health Visitor, Community Nurse, Midwife, Community Psychiatric Nurse, Hospital Nurse, School Nurse, Mental Handicap Nurse

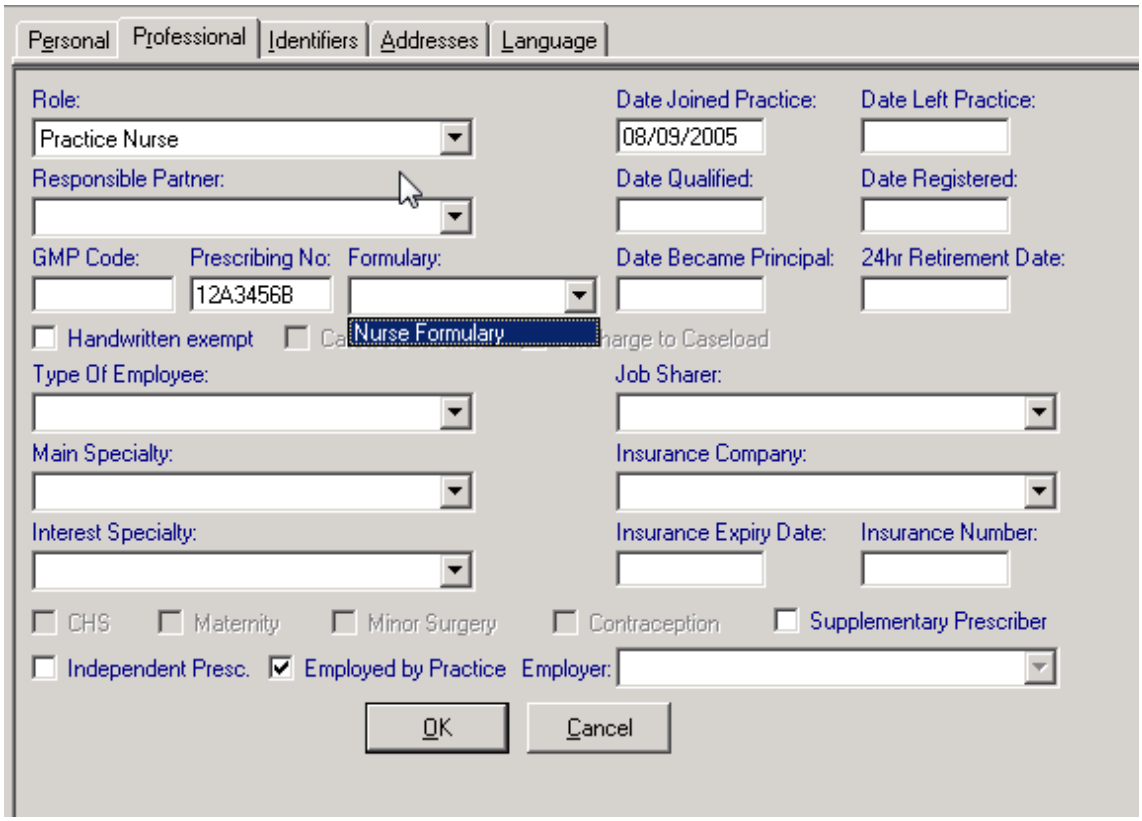
12. **Prescribing number -** A nurse can be either prescribing or non-prescribing. If you select one of the above nurse roles and enter a Prescribing Number for that nurse, then they are deemed to be a **nurse prescriber**. (This in turn enables you to tab across to the Formulary field for Extended Nurses Formulary, though this is no longer relevant for nurse prescribing).

    - In England and Wales, the prescribing number is an 8 character alphanumeric field with the format NNANNNNA where N is a number and A is a letter, e.g. 12A3456B. This too can be entered in either upper or lower case and is converted to upper case for the record.
    - In Scotland, the prescribing number is a 5 character alphabetic field. The first is the Health Board cipher, the second two are the unique identifier for the nurse, and the last two identify the practice. This can be entered in either upper or lower case and is converted to upper case for the record.
    - In Northern Ireland, the format is four digit numbers (pricing numbers).

13. **Formulary** (prescribing nurse only) - Tab across from the Prescribing Number to the Formulary picklist. This is only relevant if you are adding a Community Nurse Practitioner Prescriber who uses a nursing formulary. From the picklist, click on and select either:

    - **Nurse Formulary** (the default) - Since September 2001 suitably trained District Nurses, Midwives, and Health Visitors have been allowed to prescribe from a subset of available drugs, referred to as the Nurse Prescribers' Formulary (NPF) (see Drug Tariff Part XVIIB (i)), or in the BNF, Nurse Prescribers' Formulary.

- **Extended Nurse Formulary** - Since April 2002 a further category of Nurses and Midwives, after a suitable period of training, are given access to a larger subset of drugs known as the Nurse Prescribers' Extended Formulary (NPEF) (see Drug Tariff Part XVIIB (ii)). The NPEF contains all the items in the NPF.



14. The next step depends on the prescribing status of the nurse prescriber or pharmacist:

    - **Nurse Independent/Supplementary Prescriber -** If you are adding an Independent/Supplementary Prescriber, once a Prescribing Number has been entered and suitably validated, tick the Independent Prescriber box. Do not select a formulary. Different functions are permitted in Vision for Independent (IP) or Supplementary (SP) nurse prescribers. For nurse independent prescribers and non-GP non-nurse independent prescribers, items which they cannot prescribe are filtered from the drug select list in Consultation Manager.
    - **Community Nurse Practitioner Prescribers -** The Extended Nurse Formulary is no longer relevant for nurse prescribing. However, if you are adding a Community Nurse Practitioner Prescriber who uses a nursing formulary, once a Prescribing Number has been entered and suitably validated, **tab** across to Formulary where you can select **Nurse Formulary**. This nurse will only be able to select items from the Formulary on Therapy Add.
    - **Employed by Practice -** This is ticked by default to signify the prescriber is employed by the practice. If the prescriber is employed elsewhere, then untick this box and select the organisation or HB for which they work in **Employer**. This organisation or HB should previously have been entered in Control Panel - File Maintenance - Organisation.

15. **Type of Employee** - Select from 1/2 Time, 3/4 time, Agency, Contract, Full Time, Job Sharing, Part-Time.
16. **Main Speciality** - Optionally, select the main speciality in which the nurse is interested (see *NHS Specialities* (page 85))
17. **Interest Speciality** - Optionally, display the options and select an interest speciality. The list from which to choose is the same as Main Speciality.
18. **Dates Joined and left Practice** - Enter the date the nurse joined the practice. Once a nurse has retired, left or died, enter a date In Date Left Practice, but leave blank if not yet relevant.
19. **Date Qualified** – An optional entry.
20. **Date Registered** – An optional entry.
21. **Date Became Principal** – For GPs only.
22. **Date of 24 hour retirement** - For GPs only, not relevant for nurses.
23. **Job Sharer** - If the staff member is job sharing, display a list of other staff members, and click on the member of staff with whom the currently staff member is sharing a post.
24. **Insurance Company, Expiry Date, Ref No** - An optional entry - display the options and click on your selection from Organisations already entered (if you have not already done, this, you can return and edit this entry later). Enter the *Insurance Ref. No* and *Insurance Expiry Date.*
25. **CHS, Maternity, Contraception, Minor Surgery** - For GPs only, not relevant for nurses.

That completes the Staff Professional tab.

Staff Address and phone number (optional)

The main address and phone numbers of the nurse can be entered by clicking on **Add** under the **Main Address** window on the Personal tab. Any other addresses for the nurse can be entered from the Addresses tab.

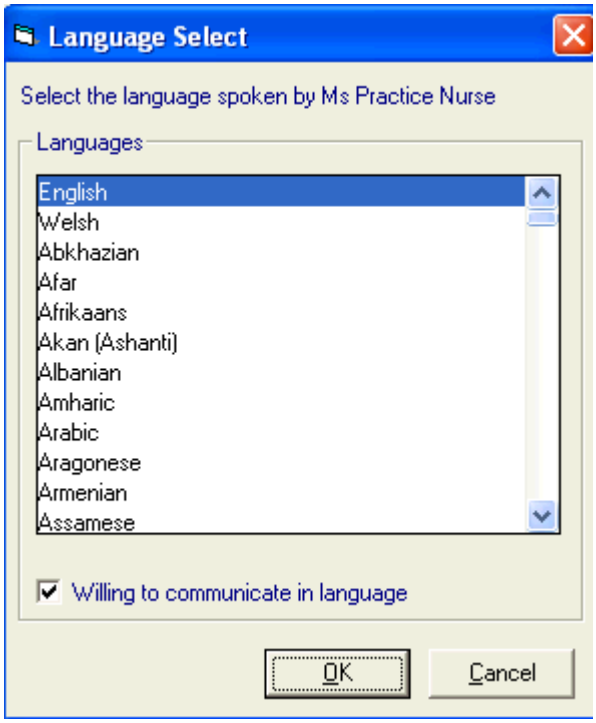
Staff Identifiers – for a Nurse

1. Click on the **Identifiers** tab.
2. The **NMC PIN** (previously UKCC PIN) can be entered for each nurse. Click on Add. In Identifier Type, select NMC PIN. Leave Organisation blank. in Identifier Value, enter the code. Click OK.
3. If the nurse prescriber is permitted to issue private controlled drug prescriptions, then a private controlled drug code must be entered in **Identifiers - Add - Identifier Type.** The PCD code in England has the format 6AAAAA (eg 6ABCDE); and the IPC code in Wales PNNNNNN, eg P123456. This includes nurse SPs and IPs in England, IPs in Wales, and SPs and IPs in Northern Ireland. Nurses in Scotland are not permitted.
4. All supplementary prescribers in Wales (nurse or pharmacists) should have a HSW registration number entered in Vision so this will be printed on the bottom of prescriptions. This is in addition to the Prescribing Number which is also printed on the prescription (on the same line as the supplementary prescriber's name). The HSW registration number should be entered in **Add Identifiers.** In Identifier Type, select HSW Registration Number. Organisation is greyed out. In Identifier Value, enter the HSW Registration Number, the format for which is S followed by six digits.

Staff - Language Tab

The Language tab in the File Maintenance – Staff allows you to record the spoken, written and reading language abilities of your staff.

1. From **Management Tools** - **Control Panel**, select **File Maintenance**.
2. Click on the staff icon or the Staff tab to list existing staff.
3. To Edit an entry:
   - Either right click while pointing to the member of staff's name and select **Edit Staff**;
   - Or click on the staff member to be amended and click on the **Edit** icon.
4. Click on the **Language** tab.
5. The three tabs available are Spoken Language, Written Language and Read Language. Choose the one required and select **Add**.
6. A list of languages is displayed, scroll to find the one you want or press the first letter of the language required.
7. Highlight the language and if applicable, tick the box **Willing to communicate in language**.



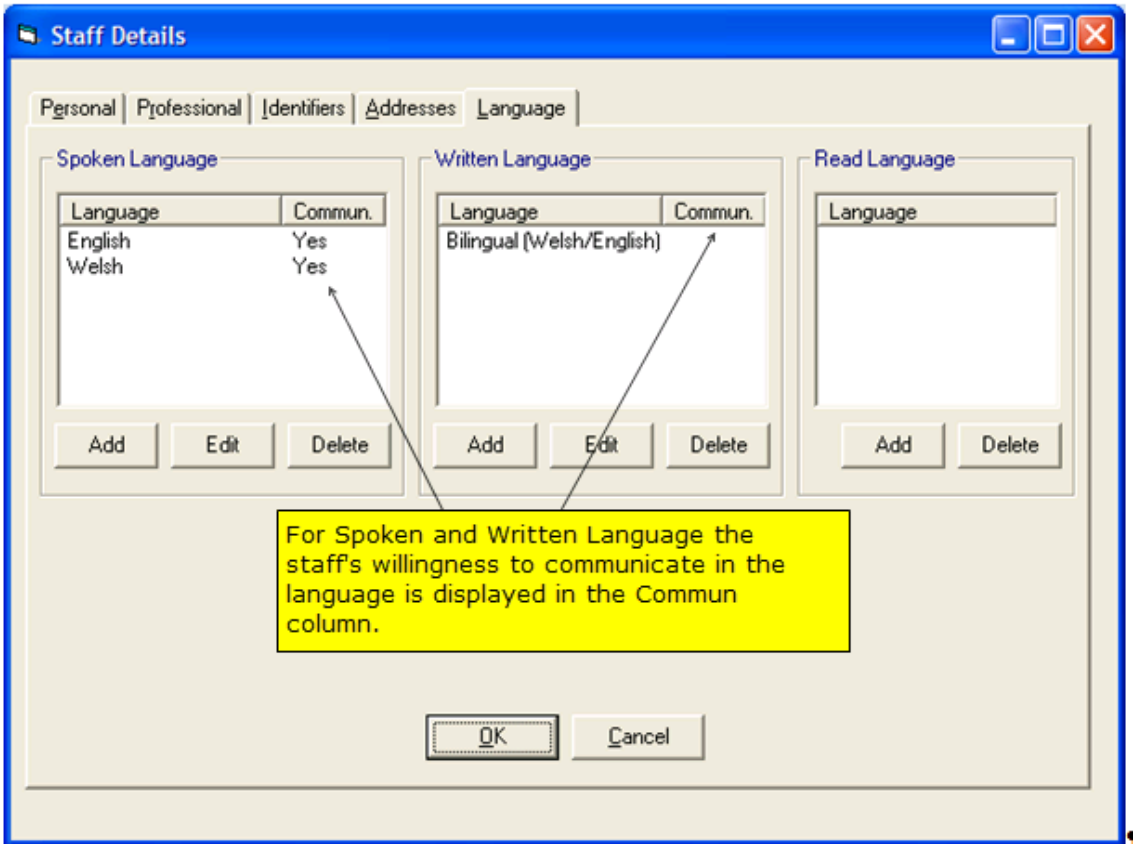
Language Select - England, Northern Ireland and Scotland

Language Select - Wales

Note - For practices in Wales the first option in the list is Bilingual (Welsh/English).

8. To save the selection click **OK**.

9. To exit the Staff Language tab, click **OK.**



Staff Languages

Note - For each language type (eg spoken, written or read), multiple languages can be recorded, but you cannot add the same language to the same type multiple times.

To Delete a Language Preference

To delete an entry that has been recorded under Language spoken, written or read, highlight the entry and select the **Delete** button.

You are warned that the entry is about to be deleted - click **Yes** to confirm the deletion. To exit the Staff Language tab, click **OK**.

See also *Staff Languages - Reporting* (page 159).

Save the details and set up computer use

1. Finally click OK to save the details.

   You will be asked: *Do you want to set up a new User for this member of staff in the Security module?*

2. If the new nurse is to use Vision on the computer, then they must be given a Login name and password - answer **Yes**. Only answer No if the nurse is never likely to use Vision.
3. The **User Details - Add** screen is shown within the **Security** module.
4. **Login Name** - This is a short name used as a User-ID for computer use of Vision. A login name belongs to a user. Up to 20 characters.

5. **User Level** - This is not currently in use.
6. **Inactive** - Leave unchecked if the nurse is a current member of staff.
7. **Valid From and Valid Until** - Enter a Valid From date, from when the user is valid to use the computer. You can leave Valid Until blank if open-ended.
8. **Enable Browse config window** - If this option is checked, then on Select Patient browse lists, and in Consultation Manager classic view browse lists, such as Therapy lists and List-Contraception, you can double click on the small square to the left of the column headers to add or remove details to be included in the browse lists.
9. **Default Displays**: The following are default displays that will take effect when this user is signed on - these can be left blank:
    - **Select Drugs from Drug Formulary** - While using Therapy in Consultation Manager, and selecting drugs in Therapy Add, either the full Drug Dictionary or the practice-defined Formulary is displayed first. You can switch between the two at the time of selection in Therapy. Many prefer a locum, GP Registrar or nurse to select from the Formulary by default.
    - **Select READ from READ Formulary** - In Consultation Manager, when displaying the READ dictionary to select a READ term, either the full READ Dictionary or the practice-defined READ Formulary is displayed first. It is possible to switch between the two at the time of selection.
    - **Drug Selected By** - Choose the ways you display the drugs dictionary or formulary - either by Drug Class, or alphabetically by Drug Name. This becomes the default display for the user when select therapy items in Therapy Add. It is possible to switch between the two at the time of selection.
    - **Read Selected By** - Choose either READ Hierarchy (ie by code) or Keyword as the default way this user will select items from the READ Dictionary. You can switch between the two at the time of selection.
10. Click on OK to save the entries.
11. For a new user, this displays the Change Password screen. Each computer user needs a password in order to sign on to Vision, though you need to warn the new user that the password you are about to enter now will have to be changed by them the first time they sign on.
12. **New password** - Type in a password, between six and twelve characters long. Note - nothing will show on screen as you type, not even asterisks. **At least one character must be non-alphabetic.** Press the Tab key to move on a field.
13. **Confirm New password** - Retype the password in exactly the same way.

    Note - when changing passwords, a password cannot be repeated until five other dissimilar passwords have been used. In other words, you can re-use the same password once every six times

14. Click on OK, or press Enter.

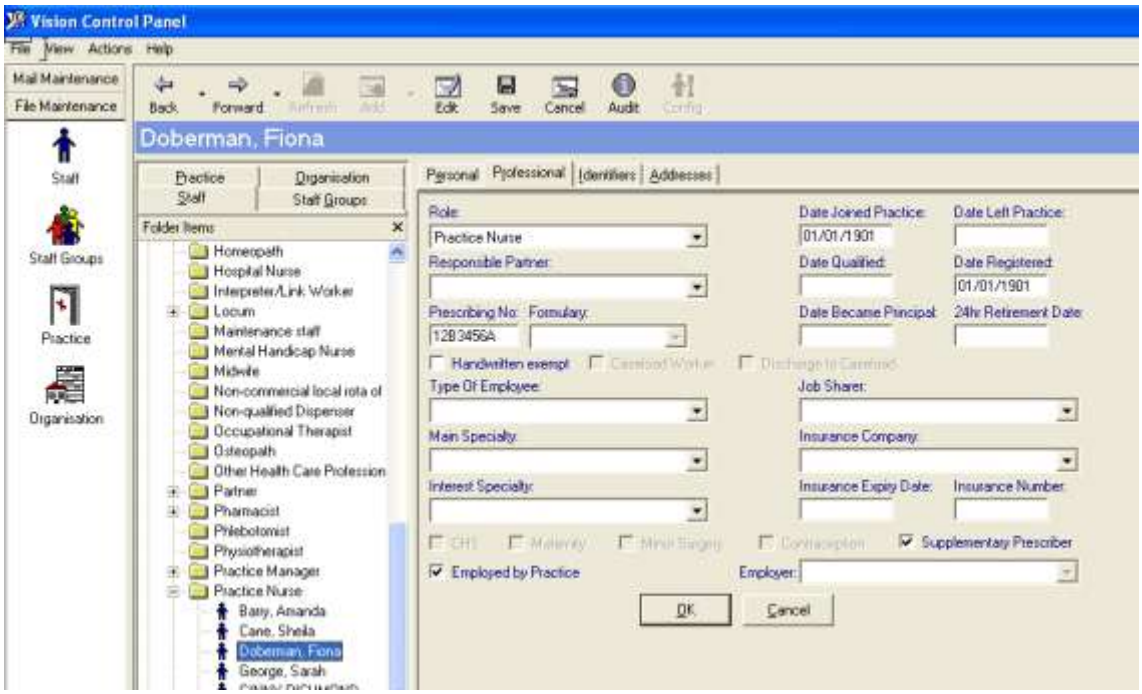
You are returned to the File Maintenance Staff list.

Add Pharmacist as Supplementary Prescriber

Supplementary Prescribers are usually pharmacists. They can prescribe from a wide formulary and print prescriptions. They have access to shared patient records and patients in their care are treated as partners, involved in all stages in decision making, including whether part of their care is delivered via supplementary prescribing. There are no legal restrictions on the clinical conditions which supplementary prescribers may treat, though it is most likely to be dealing with long-term medication conditions such as asthma, diabetes or CHD.

1. Vision - Control Panel - File Maintenance - Staff.
2. Display the Staff details screen:
   - If you are adding a new member of staff, right click, and select Add Staff. Follow the instructions in *Add Nurses* (page 69) together with the additional steps below.
   - If you are editing an existing member of staff, right click and select Edit Staff.
3. A Supplementary Prescriber can be one of the following roles on Staff-Professional:
   - Pharmacist (and also Practice Nurse, Health Visitor, Community Nurse, Midwife, Community Psychiatric Nurse, Hospital Nurse, School Nurse, Mental Handicap Nurse).
4. Check the box **Supplementary Prescriber** on Staff-Professional.
5. Enter the **Prescribing No**: - the RPSGB code, if a pharmacist . If a nurse, then in England the format is NNANNNNA where N is a number and A is a letter, e.g. 12A3456B. In Scotland, the prescribing number is a 5 character alphabetic field (AAAAA); the first is the Health Board cipher, the second two are the unique identifier for the nurse, and the last two identify the practice. Northern Irish practices can enter a 4 or 5 digit code.
6. **Supplementary Prescribers in Wales need HSW Registration Number** - All supplementary prescribers in Wales (nurse or pharmacists) should have a HSW registration number entered in Vision so this will be printed on the bottom of prescriptions. This is in addition to the Prescribing Number which is also printed on the prescription (on the same line as the supplementary prescriber's name). The HSW registration number should be entered in **Add Identifiers.** In Identifier Type, select HSW Registration Number. Organisation is greyed out. In Identifier Value, enter the HSW Registration Number, the format for which is S followed by six digits. Non-SPs in Wales will not have the HSW Registration Number. If the nurse prescriber is permitted to issue private controlled drug prescriptions, then a private controlled drug code must be entered in **Identifiers - Add - Identifier Type.** The PCD code in England has the format 6AAAAA (eg 6ABCDE); and the IPC code in Wales PNNNNNN, eg P123456. This includes nurse SPs and IPs in England, IPs in Wales, and SPs and IPs in Northern Ireland. Nurses in Scotland are not permitted.
7. Click OK.

For staff employed by the health board (eg Clinical Commissioning Group), follow the same procedure for a supplementary prescriber described above but uncheck the box Employed by Practice. In Employer, select the organisation for which they work. This organisation should previously have been entered in File Maintenance - Organisation.



Add other medical staff in the practice

Add in Staff any other medical staff who are involved with your practice in Staff in the same way as GPs (see *Add Nurses* (page 69) for guidance). Medical staff outside your practice are entered under their own Organisation – under Department and Person, or directly in Person (see *Add a Consultant to a Hospital Department* (page 30).

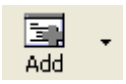
The Role determines the subsequent entries. A list of roles for Health Care Professionals other than GPs is given in *Staff Roles* (page 82). Some roles are classed as Clinicians. This has significance within Consultation Manager when entering data.

Add Non-medical staff in the practice

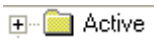
Add any other non-medical staff who are involved with your practice, including the Practice Manager, receptionists and particularly any staff member using the computer. This is important so you can audit entries. All data entry in Vision is auditable with the member of staff signed on at the time.

If you are using Correspondence Manager for scanning, or any other scanning solution, you can either add a user called SCAN; or alternatively, in Security give a current staff member a second login name of SCAN.

1. In Control Panel, select File Maintenance.
2. Click on

or the Staff tab to list existing staff.
3. Either click on the Add icon 

Or right click while pointing to

and select Add Staff.
4. Right click on 

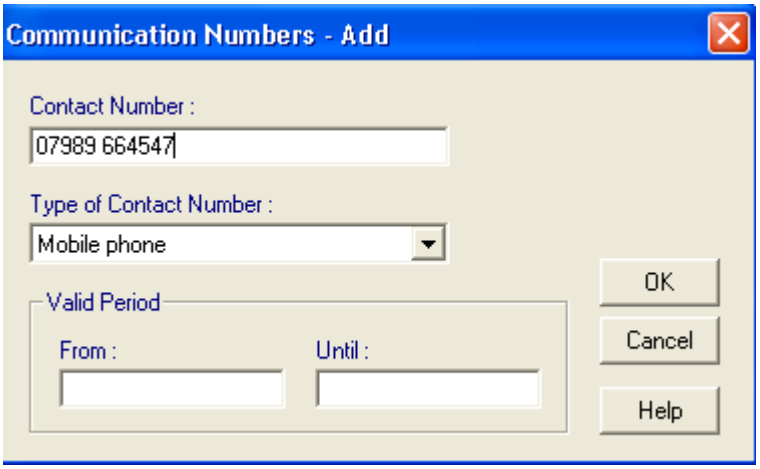
and select Display by Role. Then right click on one of the staff roles and select Add Staff. Listed below are the Administration roles, but there are other options, eg Dispenser, which can be selected - see *Staff Roles* (page 82).
    - Administrator
    - Business manager
    - Computer Manager
    - Fund manager
    - Maintenance staff
    - Non-qualified dispenser
    - Practice manager
    - Receptionist
    - Secretary
5. Complete the **Staff - Personal** screen with Name Forename, Title and Short name.
    - Enter at least the **Surname** and **Forename 1** (up to 30 characters). Use upper and lower case.
    - **Title** is a mandatory entry.
    - Optional are Forename 2, Date of birth, Sex, Previous Surname.
    - **Short Name** - This is a mandatory entry, up to 5 characters, and is a short way to identify this staff member. It must be unique
    - **Miles from practice** - An optional entry for travel expenses, to record the number of miles the staff member is from the practice. Leave blank rather than entering zero.
    - **Inactive** - Leave Inactive unchecked for current staff. If *Inactive* is ticked, then the staff member is no longer active, and will no longer appear on selection lists of active users. Any historical records will still

bear the initials of a former GP for audit purposes. For example, a GP registrar leaving the practice may be made *Inactive.*

6. On the **Staff Professional** tab, select the Role if you have not already done so in step 3 above.
   - **Type of Employee** - Select from 1/2 Time, 3/4 time, Agency, Contract, Full Time, Job Sharing, Part-Time.
   - **Main Speciality, Interest Speciality, Date Qualified, Date Registered, Date Became Principal**, **Date of 24 hour retirement** - Optional entries, usually used for GPs (or nurses).
   - **Dates Joined and left Practice** - Enter the date the staff member joined the practice. Once a staff member has retired, left or died, enter a date In Date Left Practice, but leave blank if not yet relevant.
   - **Job Sharer** - If the staff member is job sharing, display a list of other staff members, and click on the member of staff with whom the currently staff member is sharing a post.
   - **Insurance Company, Expiry Date, Ref No** - An optional entry - display the options and click on your selection from *Organisations* already entered (if you have not already done, this, you can return and edit this entry later). Enter the *Insurance Ref. No* and *Insurance Expiry Date.*
   - **CHS, Maternity, Contraception, Minor Surgery** - For GPs only.

   That completes the Staff Professional tab.
7. **The main address and phone number** of the staff member can be entered by clicking on **Add** under the **Main Address** window on the Personal tab. (Any other addresses for the staff member can be entered from the Addresses tab).
   - Entering a home address is optional. In Main Address, enter free text for House Name, Locality, Town, County.
   - Use the Tab key to move from field to field (or Shift-Tab to move to a previous entry).
   - In Road, you can type the first letter of the road then click on and select from a picklist of roads already in Vision. If not there, type in free text.
   - The Town field must be filled.
   - Postcode is up to 8 characters including the space following a valid postcode format.
8. Click OK when you have entered the address (or when you have entered at least Town) which then enables **Add Contact Number**. This is the contact number for their home address.
9. Click on **Add Contact Number**.
10. Enter the contact number, and choose the Type of contact Number: Telephone - home,
11. Click OK.
12. Any supplementary contact numbers can be added from the Addresses tab. Click on Add under Communication Nos and select from the following:
    - Fax, Telephone - business, Mobile phone, Pager, Telex, Email, Voicemail, Modem, Bleep number, Emergency number, Ex-directory, Relative, Carer.

13. Click OK, then OK again to return to the Staff - Personal screen.



14. If you want to add any reference numbers, such as the National Insurance number, click on the **Identifiers** tab. Click on Add. In Identifier Type, select Reference No.. Leave Organisation blank. In Identifier Value, enter the code. Click OK.
15. You can also add Language spoken, written and read to the Language tab.
16. Finally click OK to save the details.
17. You will be asked: *Do you want to set up a new User for this member of staff in the Security module?*

    If the new staff member is to use Vision on the computer, then they must be given a Login name and password - answer **Yes**. Only answer No if the person is never likely to use Vision.

    - The **User Details - Add** screen is shown within the **Security** module.
    - **Login Name** - This is a short name used as a User-ID for computer use of Vision. A login name belongs to a user. Up to 20 characters.
    - **User Level** - This is not currently in use.
    - **Inactive** - Leave unchecked if the person is a current member of staff.
    - **Valid From and Valid Until** - Enter a Valid From date, from when the user is valid to use the computer. You can leave Valid Until blank if open-ended.
    - **Enable Browse config window** - If this option is checked, then on Select Patient browse lists, and in Consultation Manager classic view browse lists, such as Therapy lists and List-Contraception, you can double click on the small square to the left of the column headers to add or remove details to be included in the browse lists.
    - **Default Displays**: The following are default displays that will take effect when this user is signed on - these can be left blank:
      - **Select Drugs from Drug Formulary** - While using Therapy in Consultation Manager, and selecting drugs in Therapy Add, either the full Drug Dictionary or the practice-defined Formulary is displayed first. You can switch between the two at the time of selection in Therapy. Many prefer a locum, GP Registrar or nurse to select from the Formulary by default.
      - **Select READ from READ Formulary** - In Consultation Manager, when displaying the READ dictionary to select a READ term, either the

full READ Dictionary or the practice-defined READ Formulary is displayed first. It is possible to switch between the two at the time of selection.

- **Drug Selected By** - Choose the ways you display the drugs dictionary or formulary - either by Drug Class, or alphabetically by Drug Name. This becomes the default display for the user when select therapy items in Therapy Add. It is possible to switch between the two at the time of selection.
- **Read Selected By** - Choose either READ Hierarchy (ie by code) or Keyword as the default way this user will select items from the READ Dictionary. You can switch between the two at the time of selection.

18. Click on OK to save the entries.
19. For a new user, this displays the Change Password screen. Each computer user needs a password in order to sign on to Vision, though you need to warn the new user that the password you are about to enter now will have to be changed by them the first time they sign on.
20. **New password** - Type in a password, between six and twelve characters long. Note - nothing will show on screen as you type, not even asterisks. **At least one character must be non-alphabetic.** Press the Tab key to move on a field.
21. **Confirm New password** - Retype the password in exactly the same way.

> **Note** - when changing passwords, a password cannot be repeated until five other dissimilar passwords have been used. In other words, you can re-use the same password once every six times

22. Click on OK, or press Enter.

Staff Roles

When adding new Staff, and Person in Department, their role can be identified as one of over 40 options. Throughout the system, when picking staff from picklists, the full list of possible staff roles are divided into six groups: GPs, Practice administration, Health care professionals (other than GPs), Prescribers, Principals (GPs), Clinicians.

The composition of each group is made up as follows:

GPs
Assistant
Associate
Commercial Deputising service
GP registrar
GP retainer
Locum
Non-commercial local rota of less than ten GPs
Partner (the default entry for a GP)
Salaried partner
Senior partner

Sole Practitioner

Administration
Administrator
Business manager
Computer Manager
Fund manager
Maintenance staff
Non-qualified dispenser
Practice manager
Receptionist
Secretary

Health Care Professionals, other than GPs
Acupuncturist
Carer
Chiropodist
Chiropractor
Community medical officers
Community nurse
Community psychiatric nurse
Consultant
Contact tracing nurses
Counsellor
Dentist
Dietician
Dispenser
Health education officer
Health Visitor
Homeopath
Hospital nurse
Interpreter/Link Worker
Maintenance staff
Mental handicap nurse
Midwife
Non-qualified dispenser
Occupational Therapist
Osteopath
Other Health Care professional
Pharmacist

Phlebotomist
Physiotherapist
Practice nurse
School nurse
Social worker
Speech Therapist
Stomatherapist

Principals
Senior partner
Partner
Sole Practitioner

Clinicians
Assistant
Associate
Chiropodist
Commercial Deputising service
Community medical officers
Community nurse
Community psychiatric nurse
Contact tracing nurses
Counsellor
Dentist
Dietician
GP registrar
GP Retainer
Health education officer
Health Visitor
Hospital nurse
Locum
Midwife
Non-commercial local rota of less than ten GPs
Non-qualified dispenser
Osteopath
Other Health Care professional
Partner
Pharmacist
Physiotherapist
Practice nurse

Salaried partner
School nurse
Senior partner
Social worker
Sole Practitioner
Stomatherapist

Potential Nurse Prescribers
Practice Nurse
Health Visitor
Community Nurse
Midwife
Community Psychiatric Nurse
Hospital Nurse
School Nurse
Mental Handicap Nurse

Supplementary Prescribers
Practice Nurse
Health Visitor
Community Nurse
Midwife
Community Psychiatric Nurse
Hospital Nurse
School Nurse
Mental Handicap Nurse
Pharmacist

NHS Specialities

You can allocate a main speciality and an interest specialty to a GP in Staff – Professional (see *Staff – Professional – for a GP* (page 60)), and also to Departments within Organisations (see *Department Details* (page 27)).

Accident and Emergency	Maternity function
Adult Psychiatry	Medical Microbiology
Anaesthetics	Medical Oncology
Ante-natal clinic	Medical Ophthalmology
Audiological Medicine	Mental Handicap
Blood Transfusion	Mental illness
Cardiology	Midwife Episode
Cardiothoracic Surgery	Mobile Diabetic Eye Screening
Chemical Pathology	Nephrology
Child and Adolescent Psychiatry	Neurology
Chiropody	Neuropathology
Clinical Cytogenetics and Molecular Genetics	Neurosurgery
Clinical Genetics	Nuclear Medicine
Clinical Immunology and Allergy	Obstetrics & Gynaecology
Clinical Neuro-Physiology	Obstetrics (Hospital Bed or Delivery Facilities)
Clinical Oncology	Occupational medicine
Clinical Pharmacology	Occupational therapy
Clinical Physiology	Old Age Psychiatry
Community Medicine	Ophthalmology
Dental Medicine Specialities	Optometrist
Dermatology	Oral Surgery
Diabetic Nurse Specialist	Orthodontics
Dietetics	Other than Maternity
Endocrinology	Paediatric Dentistry
ENT	Paediatric Neurology
Forensic Psychiatry	Paediatric Surgery
Gastroenterology	Paediatrics
General Medicine	Pain Management
General Pathology	Palliative Medicine
General Practice	Physiotherapy
General Surgery	Plastic Surgery
Genito-Urinary Medicine	Post-natal clinic
Geriatric Medicine	Psychotherapy
Gynaecology	Radiology

Haematology	Rehabilitation
Haematology (Clinical)	Restorative Dentistry
Histopathology	Rheumatology
Immunopathology	Speech Therapy
Infectious Diseases	Thoracic Medicine
Joint Consultant Clinics	Trauma and Orthopaedics
Learning Disabilities	Urology

Edit a staff member's details

1. In Control Panel, select File Maintenance.
2. Click on

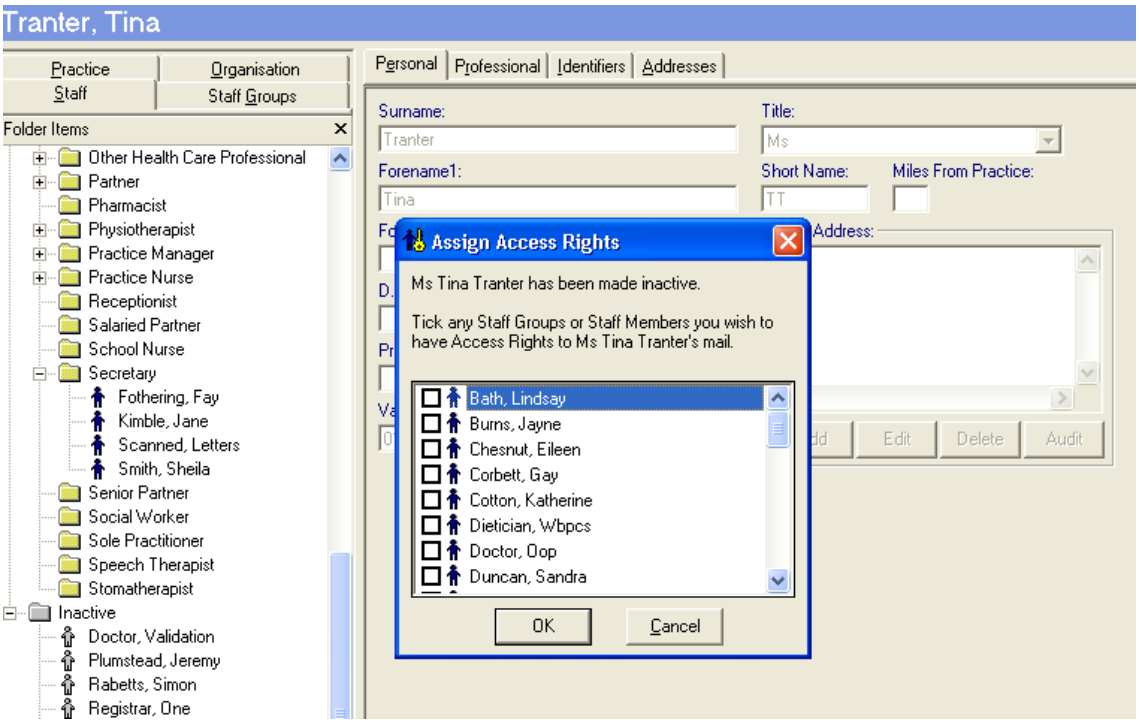
or the Staff tab to list existing staff.
3. To edit an entry:
   - Either right click while pointing to the item to be amended and select Edit Staff;
   - Or click on the staff member to be amended then click on the Edit icon

.
4. Make the amendment and click OK.
   - If the amendment is to be made on the Staff Details screen, make the correction then click OK.
   - If the amendment is to be made to the staff member's main telephone number, click on the Addresses tab. Highlight the line with the phone number *Home. [number]* listed under the Main Address. Then click on Edit under Main Address. Amend the number then click on OK.
   - If the amendment is to be made to the practice's address, click on the Addresses tab. The main address should already be highlighted. Click on the Edit button beneath Main Address. Make the correction. Click OK.
   - If the amendment is to be made to the supplementary contact numbers, click on the Addresses tab, then click on Edit under Communication Nos. Numbers listed under Communication Nos are supplementary, for example, phone numbers other than the main practice phone number, fax, mobiles, emergency number, etc.

Inactivating a user

When a staff member leaves and you no longer want them to have access to Vision:

1. Go to Control Panel - Security.
2. From the top left pane of Current Users, right click on the staff member to be inactivated and select Edit User.
3. On the User Details - Update screen, tick the box Inactive.
4. Click OK.
5. Right click on the staff member again and select Force Password Expiry.
6. Go into File Maintenance - Staff, find the same user, and click on the Edit icon.
7. Enter a Valid Until date and tick the inactive box. Click OK.
8. If you are using Mail Manager and Staff Groups, an Assign Access Rights may be displayed, asking you to select the members of staff that will have access to the mail of the staff member just made inactive. Just tick in the appropriate boxes.



Staff Groups

What are Staff Groups?

The Staff Groups facility is only available once the Mail Manager / Mail Maintenance features are switched on (see Mail Maintenance). Prior to that, the Staff Groups tab is hidden.

Mail Manager is the module through which XML Messages can be viewed and actioned.

Staff Groups are user-defined groups of practice staff members that can be selected on masse, for the purposes of copying or actioning messages in Mail Manager; for instance, a staff group of Receptionists, or of GPs, or Health Visitors.

In the Staff Access in Mail Maintenance, there is the option to allow a staff member to be granted access to a group of users' mail (see Staff Access). On selecting Receptionists as the group, the effect will be exactly the same as selecting each receptionist in three separate operations.

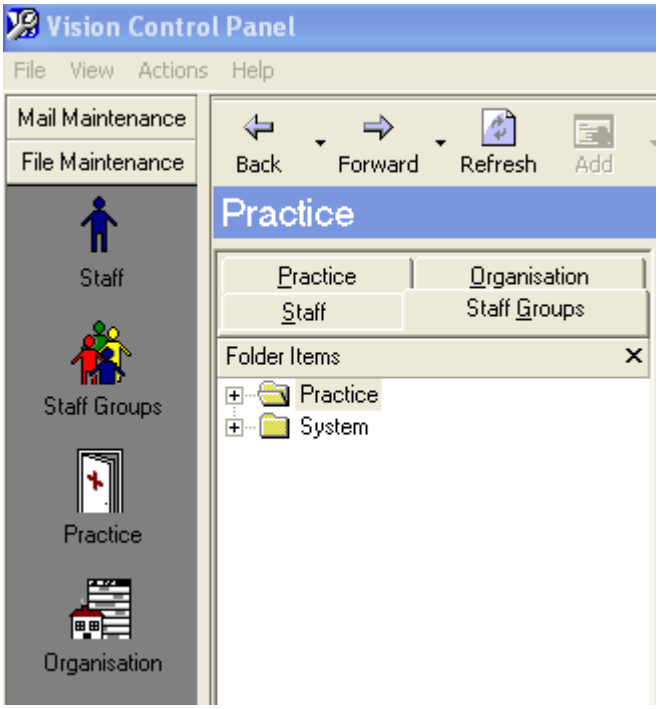
Once selected, the link to the originating group is lost. Subsequent changes to a group will NOT be reflected in any data derived from that group.

> **Note** - When you create a Staff Group and add staff members to it, you can then add the Staff Group to an Individual's mailbox in Mail Maintenance, and give them rights to all members within the group. If you add another member of staff to the group later on, this member of staff will not be added to the users who have the access rights to the group. You will need to re-add the group to the users who have the access rights to the group, in order to include the new member of staff.

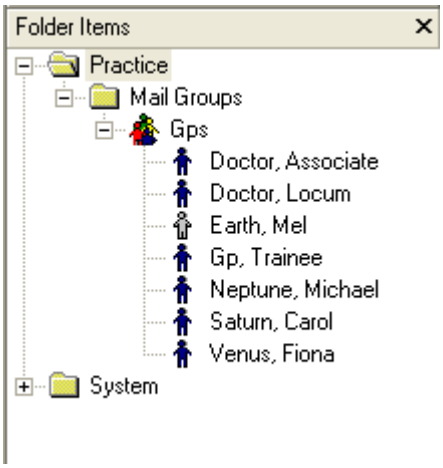
On selection of the Staff Groups tab, two folders are displayed: Practice and System:

- **Practice** – Allows you to create your own defined staff groups (ie Reception Staff, GPs, Admin etc).

- **System** – Lists groups that are defined by Vision. Currently this only consists of Frequent Staff. You are able to add and remove staff from groups in the System folder but cannot delete any groups.



Click on ⊞ beside the Practice or System folders to display existing Groups click ⊞ beside Mail Group and ⊞ beside a listed group to show all the members of the group.



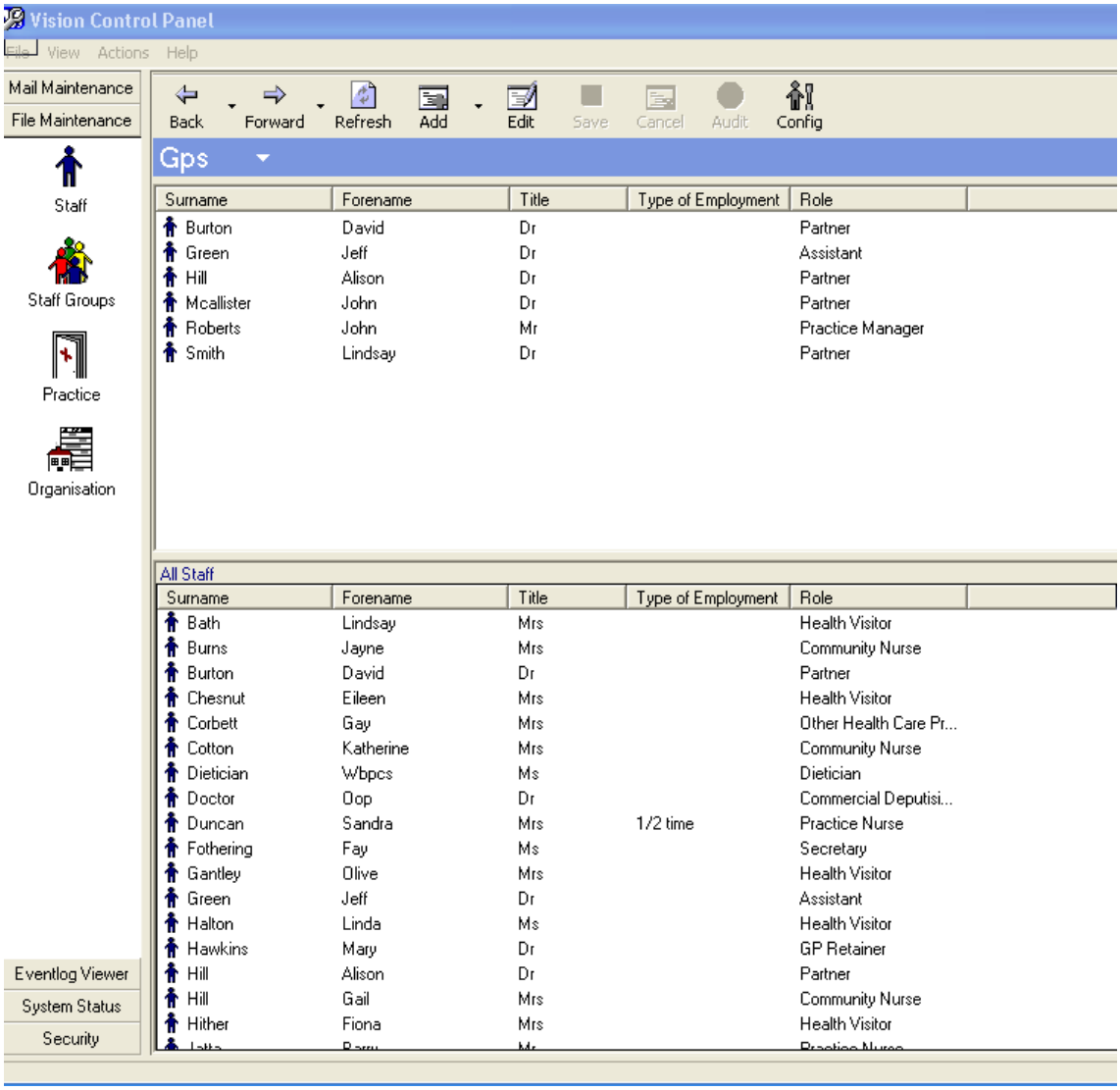
If you click on a groups heading, eg GPs, Receptionists, in the left-hand tree view, the List View in the top lists all active staff members of the group in the columns showing Surname, Forename, Title, Type of Employment and Role.

The bottom right pane has a list of All Staff.

All columns are sortable - click on the column header (eg Surname, Role etc) which sorts in ascending or descending order.

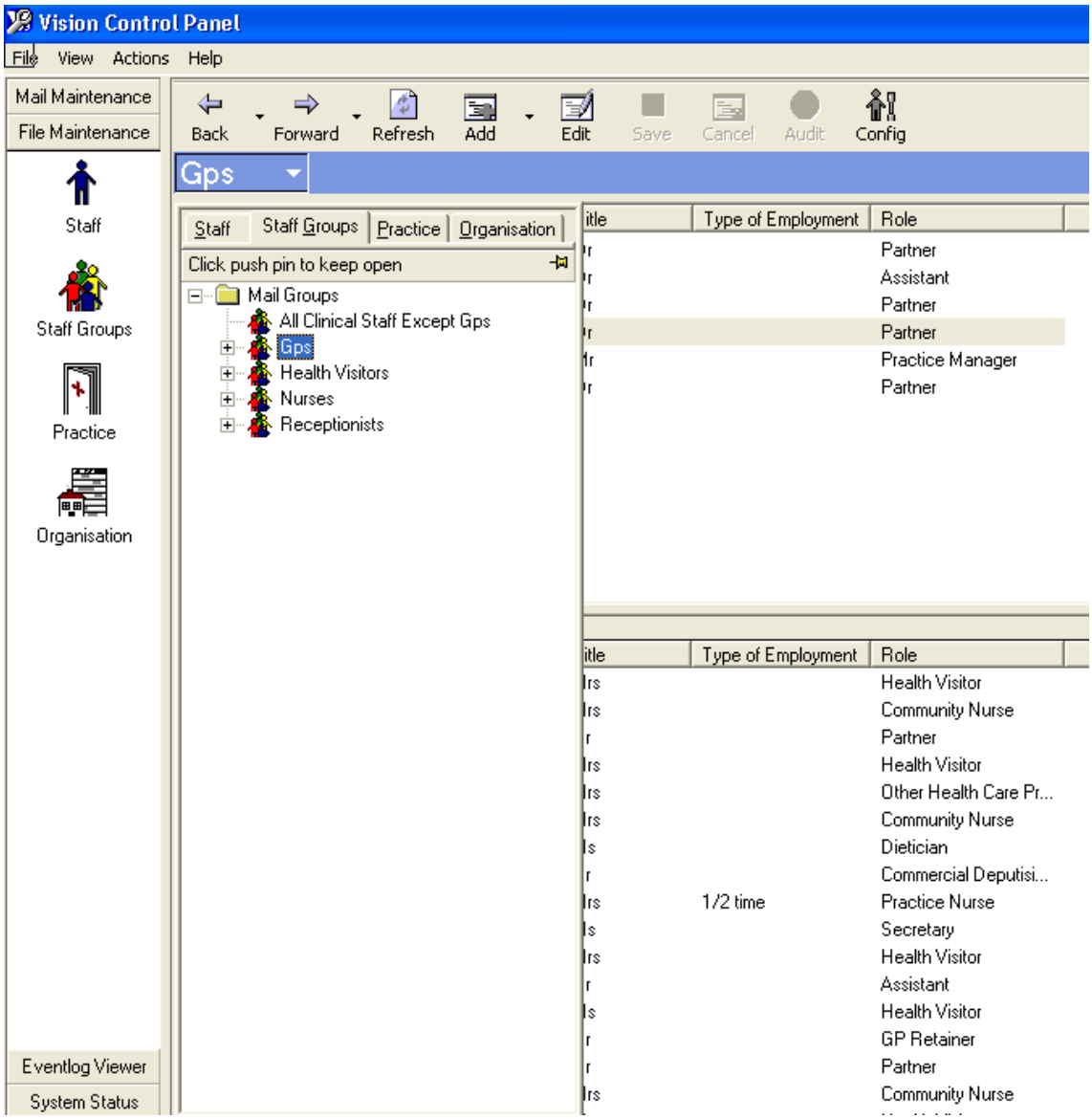
Display Changes

If you click on ✕ to the right of tree view on the blue header line, the screen display changes and hides the tree view:

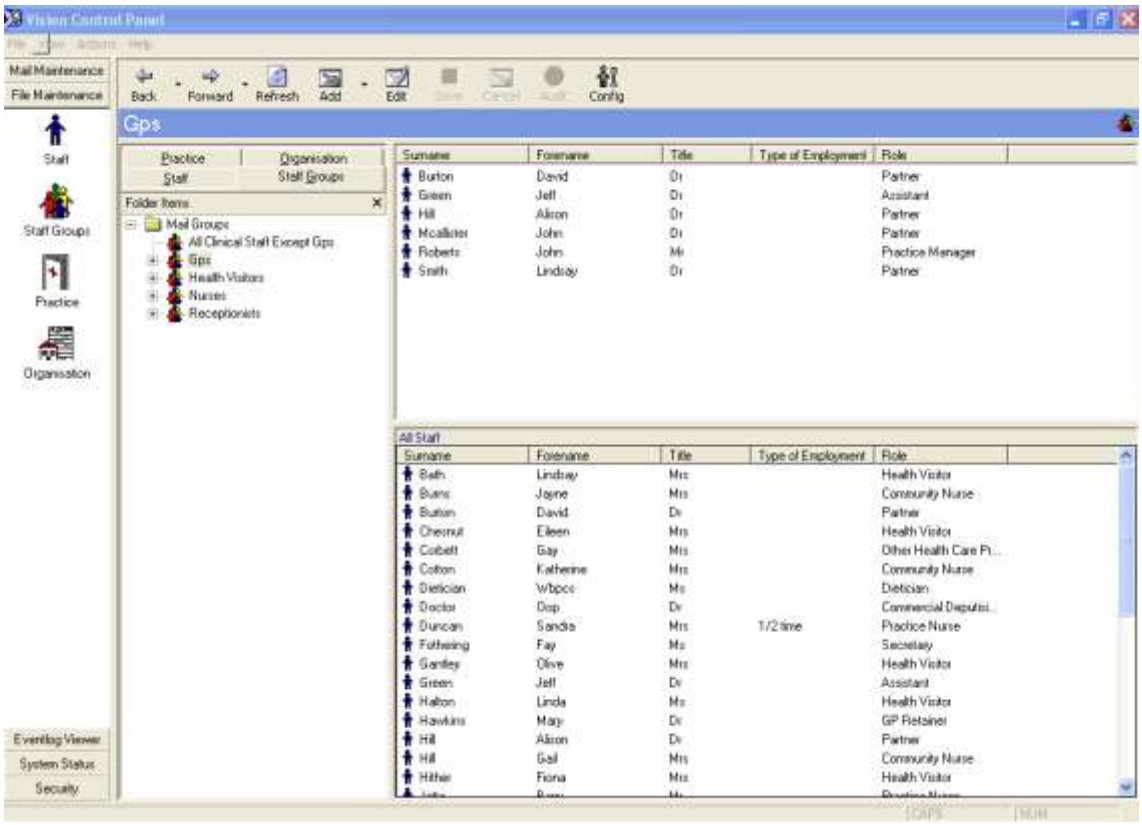

Vision Control Panel
File View Actions Help
Mail Maintenance
File Maintenance
Staff
Staff Groups
Practice
Organisation
Eventlog Viewer
System Status
Security
Back Forward Refresh Add Edit Save Cancel Audit Config
Gps
Surname Forename Title Type of Employment Role
Burton David Dr Partner
Green Jeff Dr Assistant
Hill Alison Dr Partner
Mcallister John Dr Partner
Roberts John Mr Practice Manager
Smith Lindsay Dr Partner
All Staff
Surname Forename Title Type of Employment Role
Bath Lindsay Mrs Health Visitor
Burns Jayne Mrs Community Nurse
Burton David Dr Partner
Chesnut Eileen Mrs Health Visitor
Corbett Gay Mrs Other Health Care Pr...
Cotton Katherine Mrs Community Nurse
Dietician Wbpcs Ms Dietician
Doctor Oop Dr Commercial Deputisi...
Duncan Sandra Mrs 1/2 time Practice Nurse
Fothering Fay Ms Secretary
Gantley Olive Mrs Health Visitor
Green Jeff Dr Assistant
Halton Linda Ms Health Visitor
Hawkins Mary Dr GP Retainer
Hill Alison Dr Partner
Hill Gail Mrs Community Nurse
Hither Fiona Mrs Health Visitor

If you then click on the downward pointing white arrow to the right of the title on the blue header line

, the displays changes yet again, restoring the left-hand tree view in an overlying pane:



If you click on the push pin , the display changes again and restores the tree view to the left-hand pane:



Maintaining the Groups

There are two major means of group maintenance: drag and drop and right-mouse menu. You can also use the toolbar icons to add or edit.

Drag and Drop

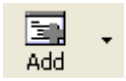
Drag and drop means pointing to an item and holding the left mouse then dragging your mouse away towards the target, where you release the mouse button which effects the drop.

Drag and drop within the tree view will only be allowed if:

- All selections are staff members who belong to a single group.
- All selections are group titles, eg GPs, Health Visitors.

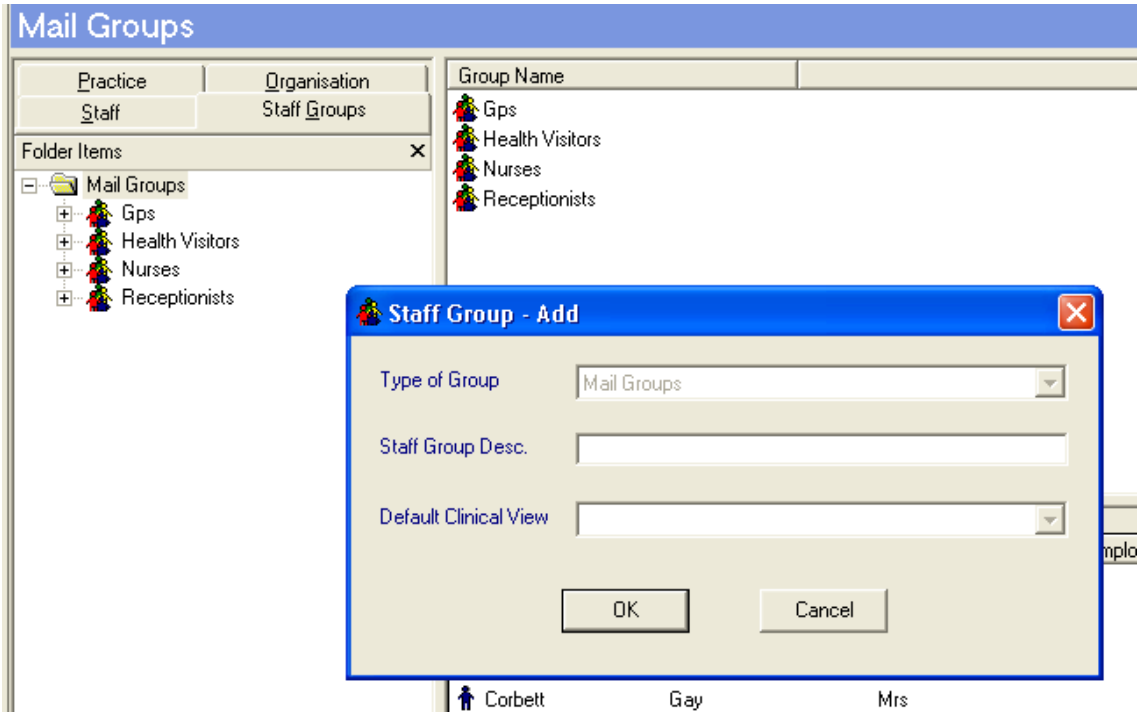
Add a group

1. Either right click on Mail Groups, in the Practice Folder at the top of the left-hand tree view**,** select **Add Group.**

   Or with the focus on a group heading, eg Mail Groups, GPs, click on the Add icon 

. picklist arrow and select Add Group.

2. On the **Staff Group - Add** screen, the Type of Group defaults to Mail Groups and is non editable. Type in a suitable Group Desc., eg GPs, Health Visitors, All clinical staff except GPs. Click OK.



Edit a group description

1. Either right click on a group heading in the left-hand tree view, and select Edit Group.

   Or with the focus on a group heading, eg GPs, click on the

icon.

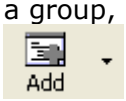
2. On the Staff Group - Edit screen, you can edit the Staff Group description.

Delete a group

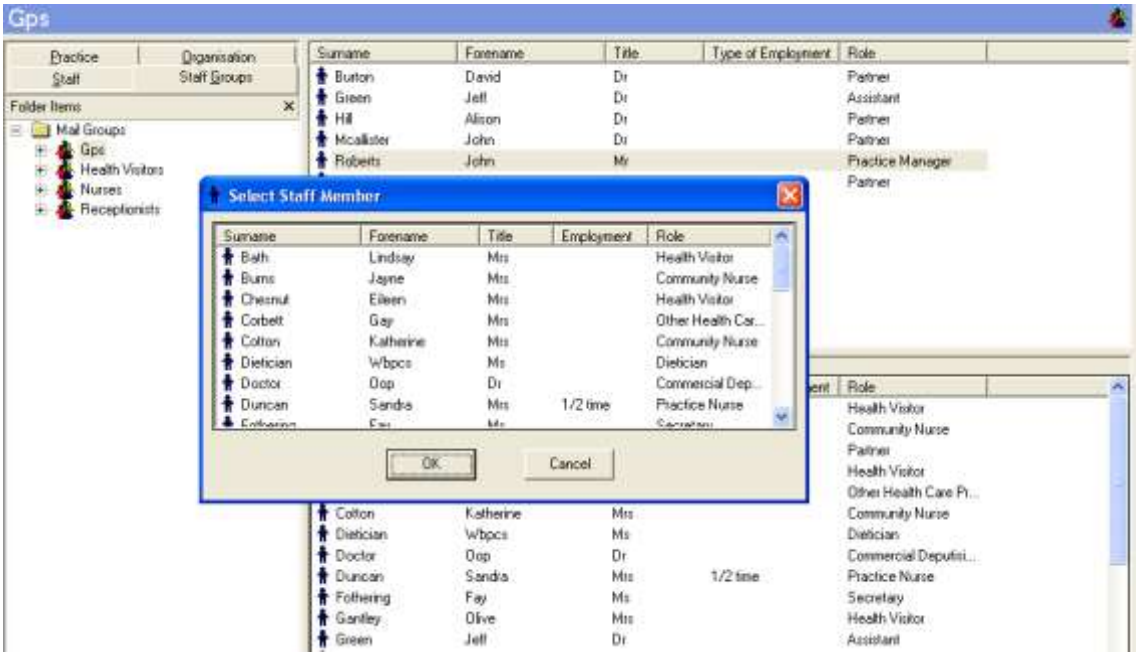
To remove a group from the Groups of Users in the bottom left pane, click on that group with the right mouse and select D**elete Group**.

> **Note -** It is not possible to delete the System Managers, Clinical Managers or All Users groups.
>
> It is also not possible to remove the System Managers group from being granted all rights to the security module.

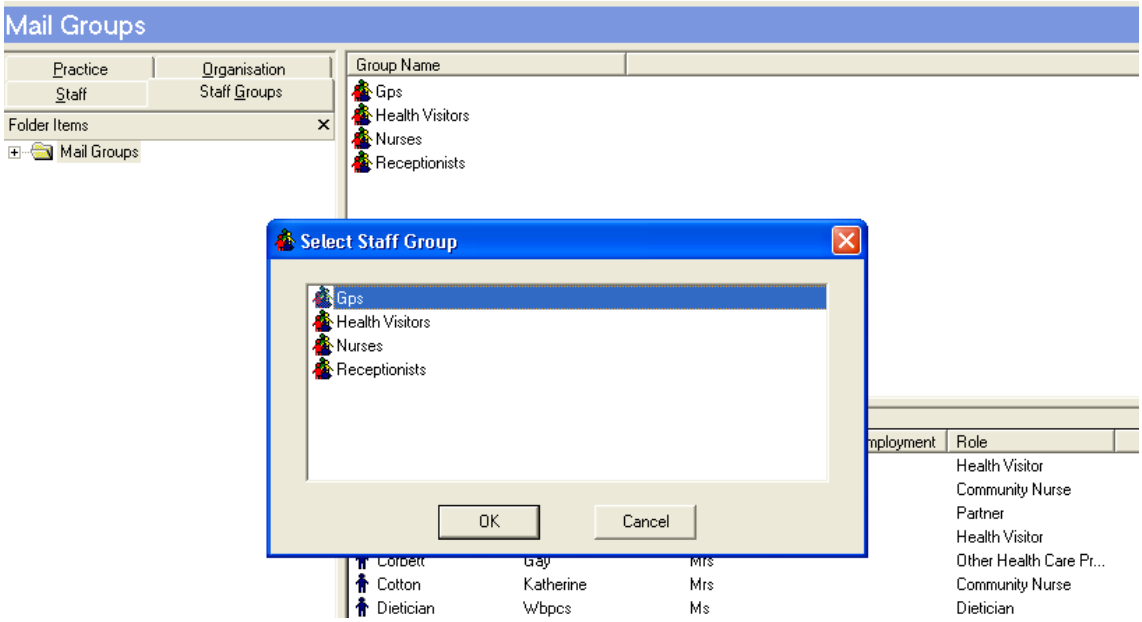
Add a person(s) to a group

1. It is probably easier to sort the names by role first - click on the Role heading once.
2. Either drag a name from the list view and drop it on to a valid group in the tree view (left-hand pane) in order to add that person to the group. If the staff member already exists in the group, then the drop operation has no effect. You can drag multiple names from the list view by holding the Control key down and clicking on selected names to highlight them, or click on consecutive names by holding the Shift key down to highlight a block of names.
    - Or when you have a group of names displayed in the top right pane, right click and select Add Staff Member(s).
    - Or right click on a group heading, eg Nurses, and select Add Staff Member(s)
    - Or if the focus is on a group heading, eg Health Visitors, or a member of a group, on the tree view, click on the picklist arrow by the Add icon 

and select Add Staff Member(s).
3. This displays the **Select Staff Member** screen - click on the staff name to be added (or hold down the Control key and click on several names) - click OK.



4. Point to the staff member in the bottom right **All Staff** list and select **Add to Group**. From the list of groups on the **Select Staff Group** screen, click on the appropriate one and OK.



5. On List View of **All Staff** in bottom right pane, right click on a staff name and select **Add to current group**. This adds the currently selected staff to the currently selected group(s) (this option is disabled if no group is currently selected in the left-hand tree view).

Move staff from one group to another

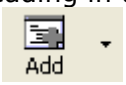
1. Drag a name between groups on the tree view. The default action of this will be to move the staff into the target group. You can drag an entire group to another group.
2. If this results in an empty source group, then you are prompted to delete the empty group. It is valid to leave an empty group between sessions as it may be needed subsequently.

Remove a person(s) from a group

1. You can drag a staff member from the left-hand tree view on to the list view in order to remove that staff member from a group.
2. When you have a group of names displayed in the top right pane, right click on a name and select Remove. This removes the currently selected staff member from the group.
3. Right click on a staff name under a group on the left-hand tree view, and select Remove. This removes the currently selected staff member from the group.

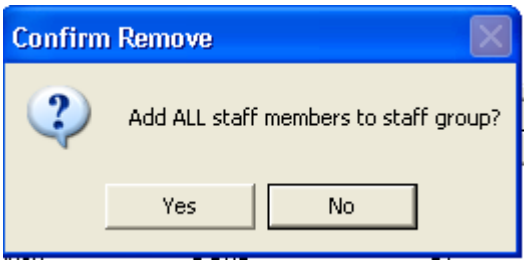
Add all staff to a group

1. Either right click while pointing to the group heading in the left-hand tree view, and select Add All.

   Or with the focus on a group heading in the left-hand tree view, click on the picklist arrow by the Add icon 

and select Add All.

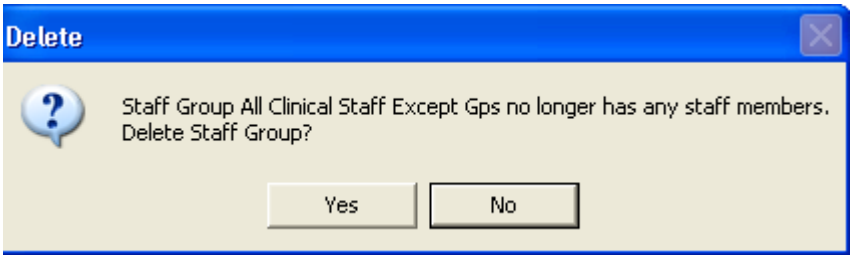
2. A Confirm Add screen asks: *Add ALL staff members to staff group*? and if you click on Yes, all staff members will be added to a group. Sometimes it is easier to populate a group this way, then right click and Remove those not wanted in the group.



Remove all staff from a group

1. Right click while pointing to the group heading in the left-hand tree view, and select **Remove All**. This empties the group after you click on Yes on the Confirm Remove screen: *Remove ALL staff members from staff group?*

2. As this leaves the group empty, you are asked: *Staff Group [name] no longer has any staff members. Delete Staff Group*? Answering Yes deletes the group, but it is perfectly valid to answer No and leave an empty group between sessions as it may be needed subsequently.



Remove multiple staff from a group

When you have a group of names displayed in the top right pane, right click on a name and select **Remove Staff Member (s)**. The select staff member window is displayed. Hold the control key down and select the staff you would like to remove. Click OK.

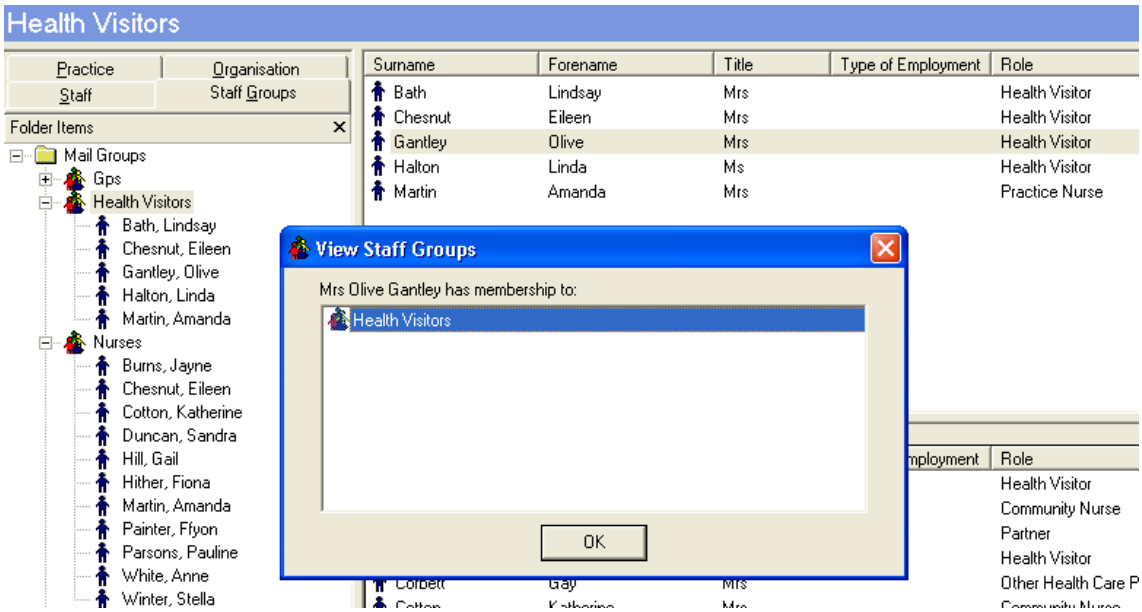
Remove access to this staff

You can remove all access rights to an individual mailbox in one step. This saves the need to remove each users rights one by one:

1. Select the Staff Access tab.
2. Right click on the name of the staff member whose mailbox you want to remove rights from.
3. Select **Remove Access to this Staff**.
4. When prompted to confirm access removal, select yes.
5. All access rights to the selected mailbox are now revoked.

View Staff's Groups

Right click on a staff name and select View Staff's Groups. This lists all the groups to which the currently selected staff member belongs



Remove a staff name from all groups

On List View of **All Staff** in the bottom right pane, right click on a staff member and select **Remove from all groups**. Their name will be removed from *all* groups.

Frequent Staff

Frequent Staff is a System Defined group found in File Maintenance – Staff Groups – System Folder – Frequent Staff. This group can be maintained by your practice to define a list of staff to whom you most frequently allocate messages to in Mail Manager.

1. Go to **Control Panel – File Maintenance – Staff Groups**.
2. Click on ▪ next to the **System Folder** to display the Frequent Staff folder, then ▪ to display the **Mail Allocation** group.

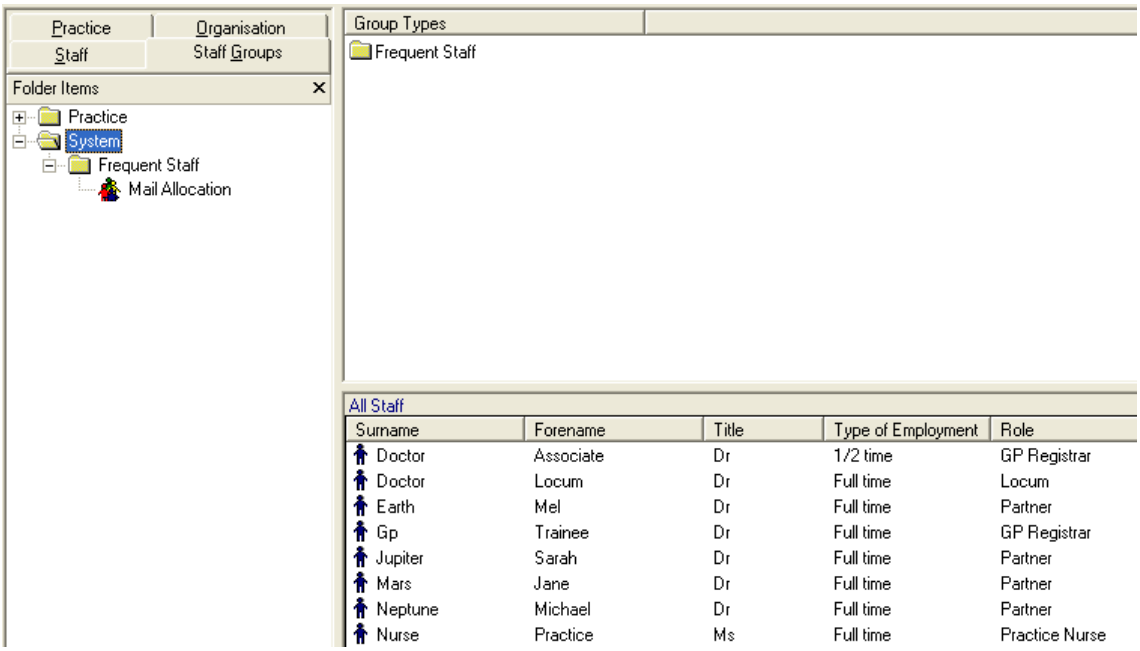


Figure 6: System – Frequent Staff - Mail Allocation

3. To add staff to the Mail Allocation list, highlight the required staff from the **All Staff** window and drag and drop required staff into the Frequent Staff folder.

> **Reminder** – If the staff member listed does not have an associated Vision login, they will not be permitted to be added to the Mail Allocation staff group.

4. From now on, when you want to allocate/re-allocate messages in Mail Manager using the right click menu – Allocate Staff, you are presented with the Frequent Staff list.

Figure 7: Allocate to Staff list in Mail Manager

Staff Configuration Utility

Staff Configuration Utility (Staff Maintenance Utility) - This option is available to system supervisors only and provides a quick way to update users or workstations, without having to either call up each individually, or move around the practice.

Click on the icon

, or Actions - Staff Config.

This is a tabbed screen which allows you to do quick updates of various functions.

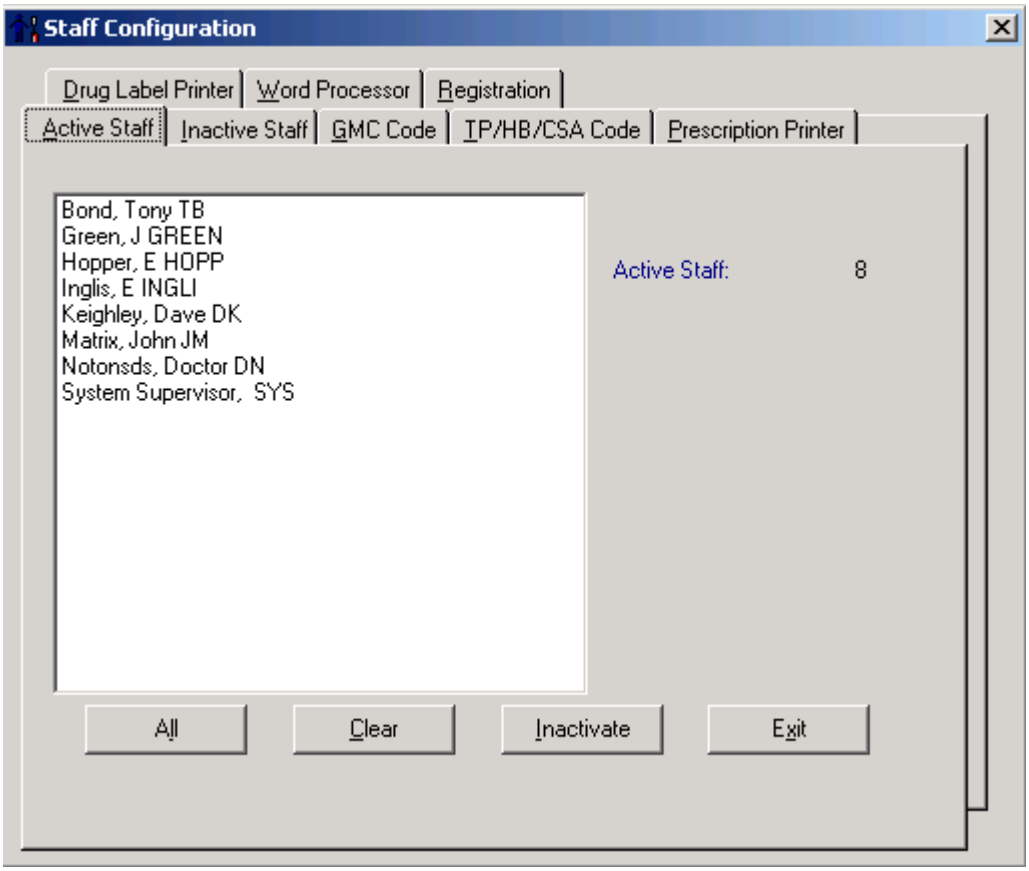
- From lists of staff, you can quickly update the GMC code and the GP Code, inactivate or activate – all activities normally carried out in File Maintenance – Staff, per member of staff.
- Set practice-wide registration default options.
- From a list of workstations, you can quickly update the Prescription Printers, Drug Label Printers, and Word Processor choice – all functions from Options – Setup (Vision front menu).

Note - Changes made in the Configuration screen are practice wide. In order for the changes to take effect, you must log out of the Registration Module.

Active Staff / Inactive Staff Tab

1. **To Inactivate Staff** – Click on the Active Staff tab. Highlight a member of staff, or multi-select using Control-click. Then click on Inactivate. Inactivated staff do not appear on selection lists. This mirrors the Inactive box on Staff – Personal.

2. **To Reactivate Staff** – Click on the Inactive Staff tab. Highlight the staff and click on Activate.



GMC Code Tab

On the GMC Code tab, as you highlight each GP, their GMC code if entered is shown in the GMC code window. To add or edit a code, highlight a GP and click on Update. Type in the code and click OK. This is the same as entering a GMC code on Staff – Identifiers.

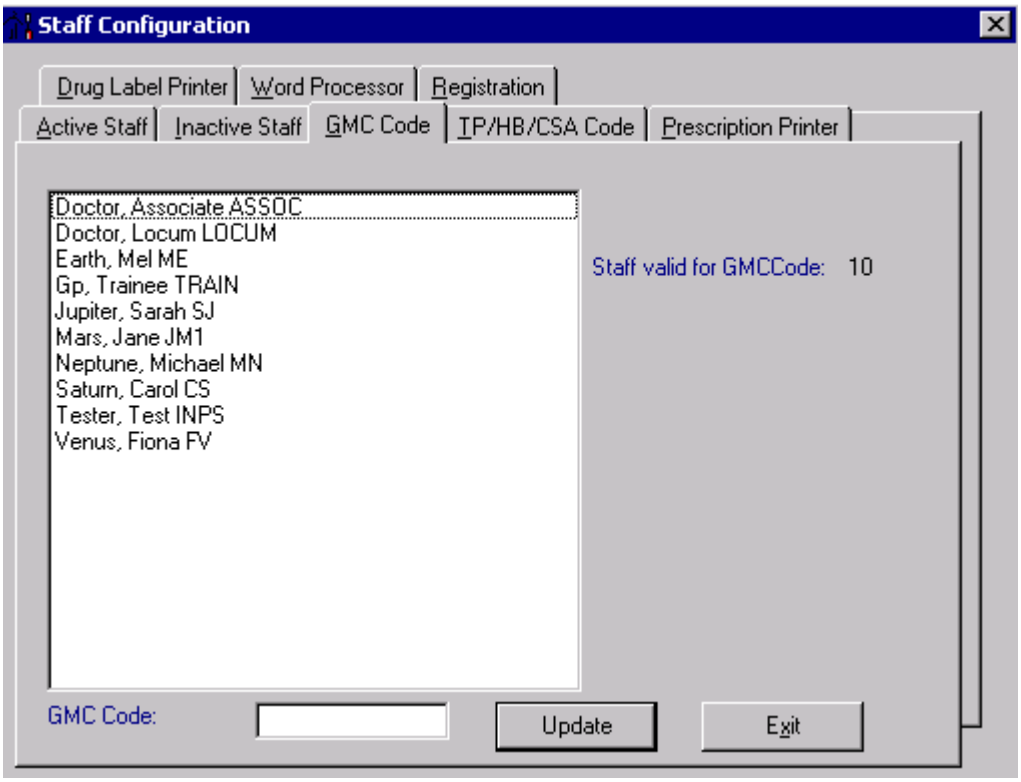


Figure 8: Staff Configuration - GMC Code

TP/HB/CSA Code Tab

This is the GP Code; and there should be a code for each GP for each TP. First select the TP in Organisation. Then, as you highlight each GP, their GP code if entered is shown in the TP/HB/CSA Code window. To add or edit a code, highlight a GP, having selected the required Organisation, and click on Update. Type in the code and click OK. This is the same as entering a GP code on Staff – Identifiers.

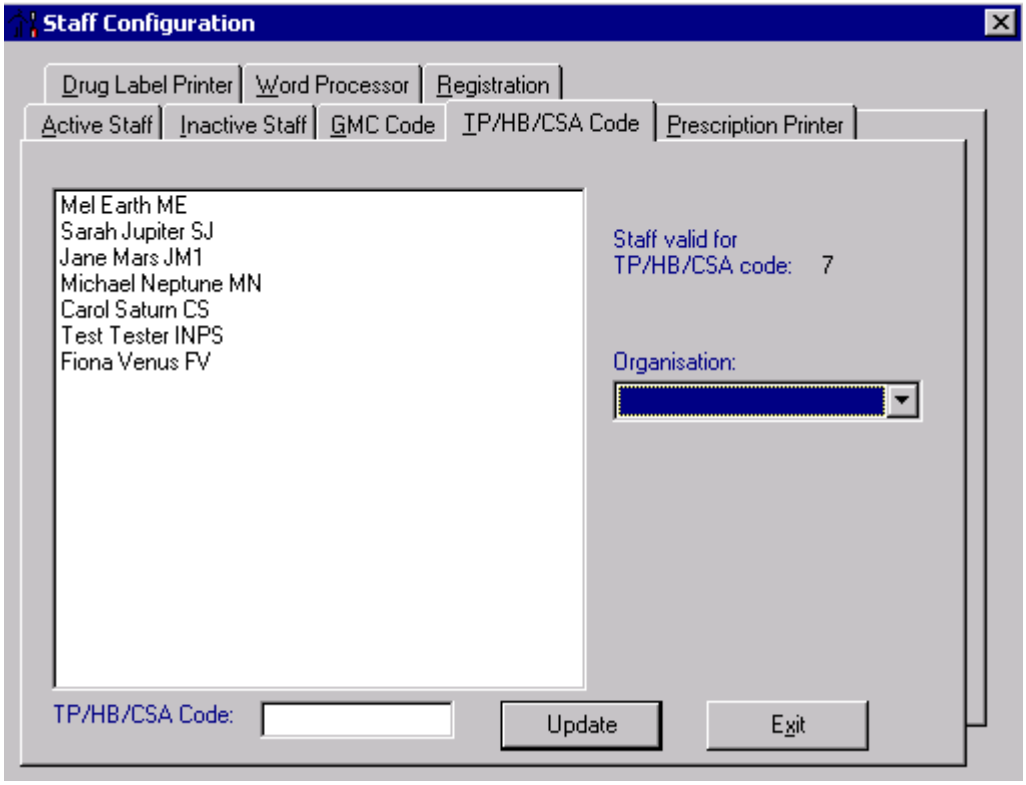


Figure 9: Staff Configuration - TP Code

The other three options list workstations rather than staff, and mirror functions from Options – Setup (Vision front menu).

Drug Label Printer Tab

For practices that are printing dispensing labels, a printer can be selected in the same way as for Prescription Printer.

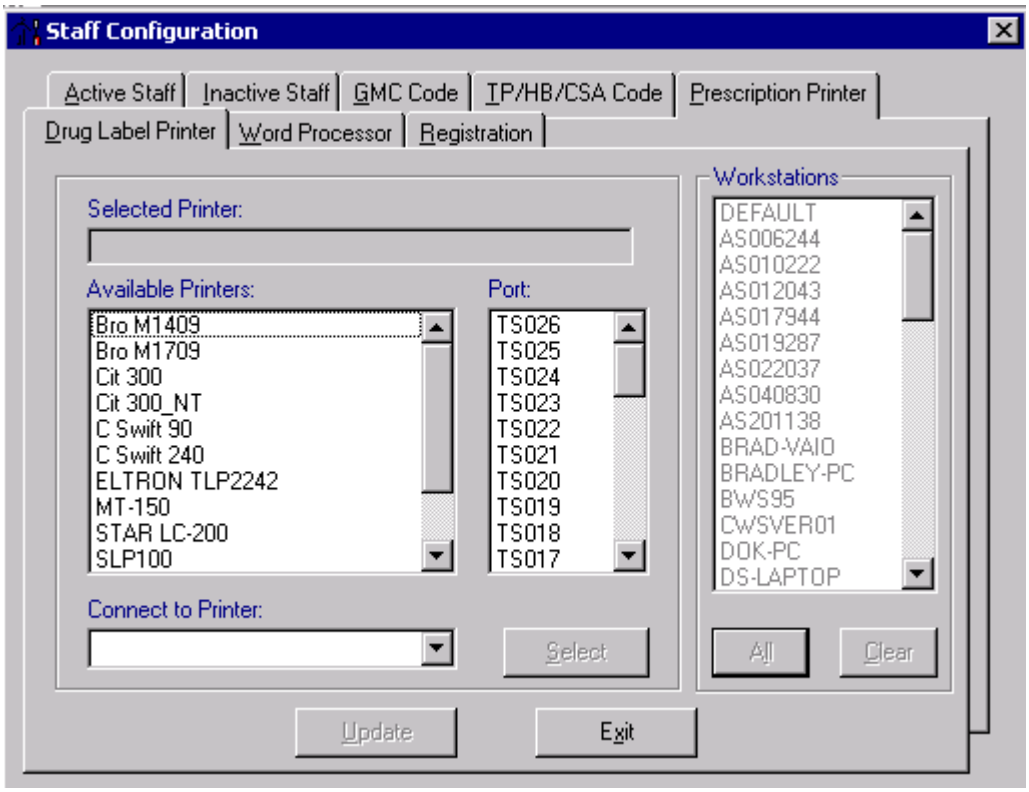


Figure 10: Staff Confirguration - Drug Label Printer

Word Processor Tab

This allows you to select a Word Processor by workstation. First click to select the workstation, or select All. Then select the correct Word Processor option – Vision Editor or Microsoft Word. Then click on Update.

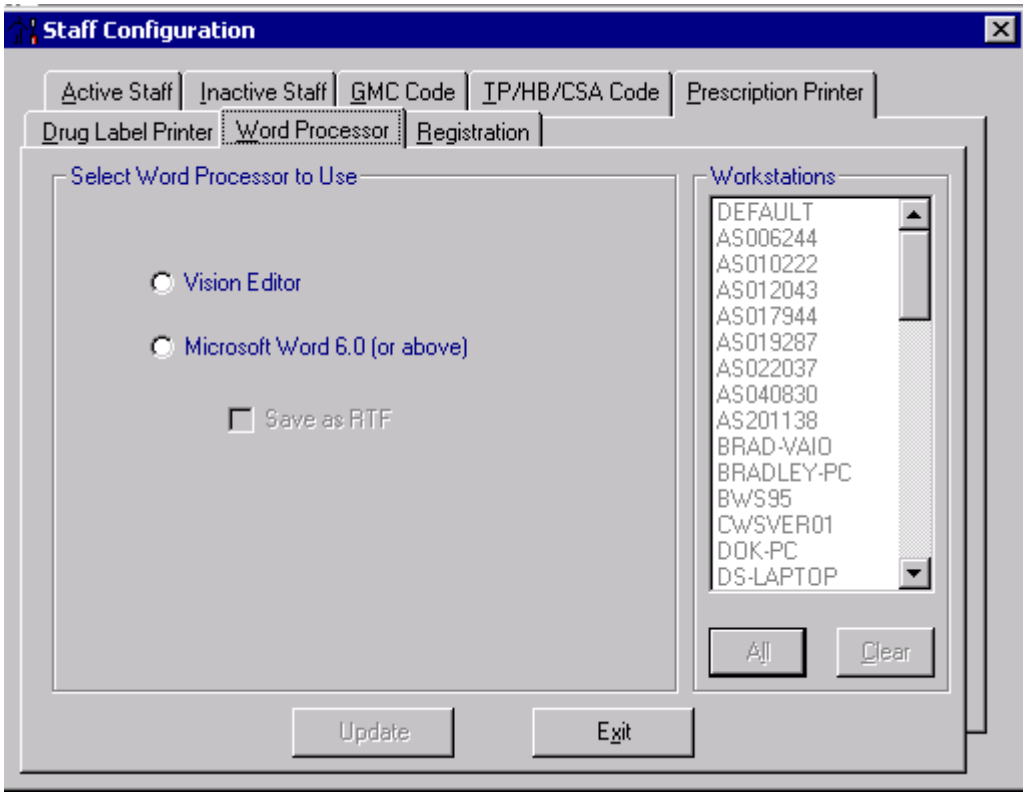


Figure 11: Staff Configuration - Word Processor

Prescription Printer Tab

First select from the list of Available Printers, then select the Port. Next, select a printer in Connect to Printer. Then click on the Select button and select one or more workstations (Control-click to multi-select, or use All). Then click on Update.

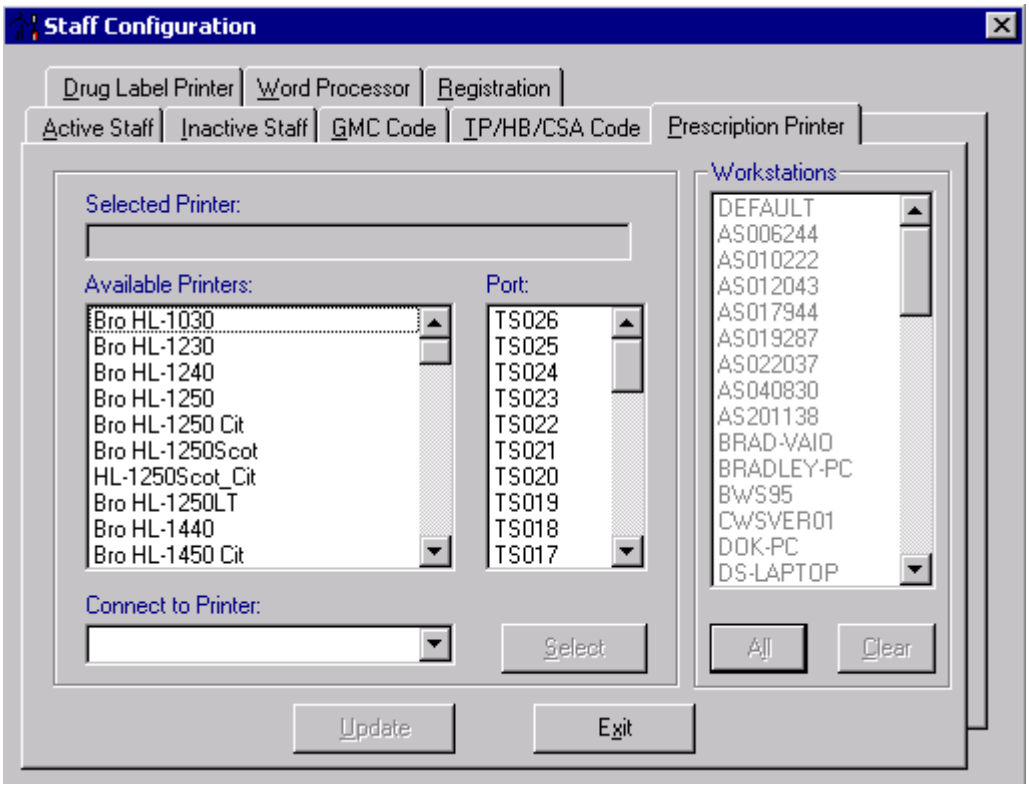
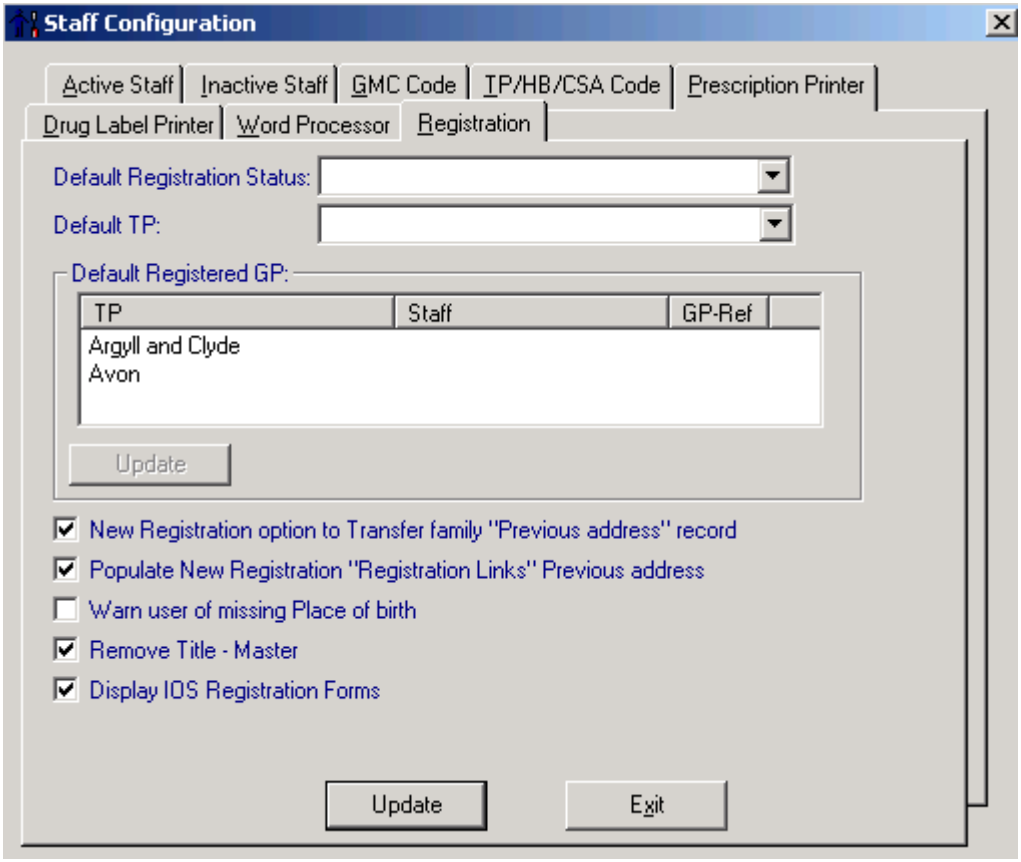


Figure 12: Staff Configuration - Prescription Printer

Registration Tab

The Registration tab in the Staff configuration screen allows you to choose the defaults for some of the options in the Registration module. Unless changed, the Registration Configuration defaults are as below:



Default Registration Status

From the Default Registration Status list, select the status you require to be the default for the whole practice, click **Update** and **OK** to save the changes. Click **Exit** to close the form..

If you do not change the default, the status of Applied is used for new registrations.

Figure 13: Configuration - Default Status

Note - On some occasions you may be registering a batch of Temporary residents, by changing the default status this will speed up the process.

Default Trading Partner

TP stands for Trading Partner, which is the agency where electronic messages are sent and received for Registration and Partners Links e.g. PCT/HB/CSA.

The Default TP option allows you to choose which TP is populated on the Registration form by default, saving you having to select it each time you register a patient. You can pick from a list of TP's that have been configured for your practice. If you do not choose a default, the TP box on the registration form will remain empty and you will have to choose a TP each time you register a patient. If you are registering a family, the default TP will remain the same as the previous family member.

Figure 14: Configuration - Default TP

Select the Trading Partner, click **Update** and **OK** to save the changes. Click **Exit** to close the form.

Default Registered GP

A default Registered GP can be saved in the Configuration screen. This means that any new Registrations default to this GP, however, this can be changed at the point of Registration. If the default is not set or the GP is subsequently made inactive, the field is blank and must be selected when registering a new patient.

Some GP's have patient's registered with more than one TP so you need to choose the PCT/HB/CSA before selecting the GP.

1. From the Staff Configuration screen, click the **Registration** tab.
2. Highlight the TP and click **Update.**

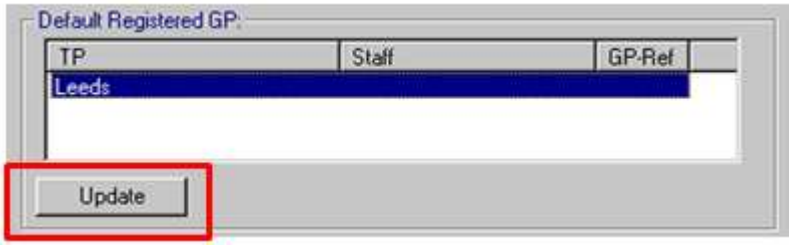


Figure 15: Configuration - Default Registered GP

3. Highlight the GP who you want to save as the Default and choose **Set**.

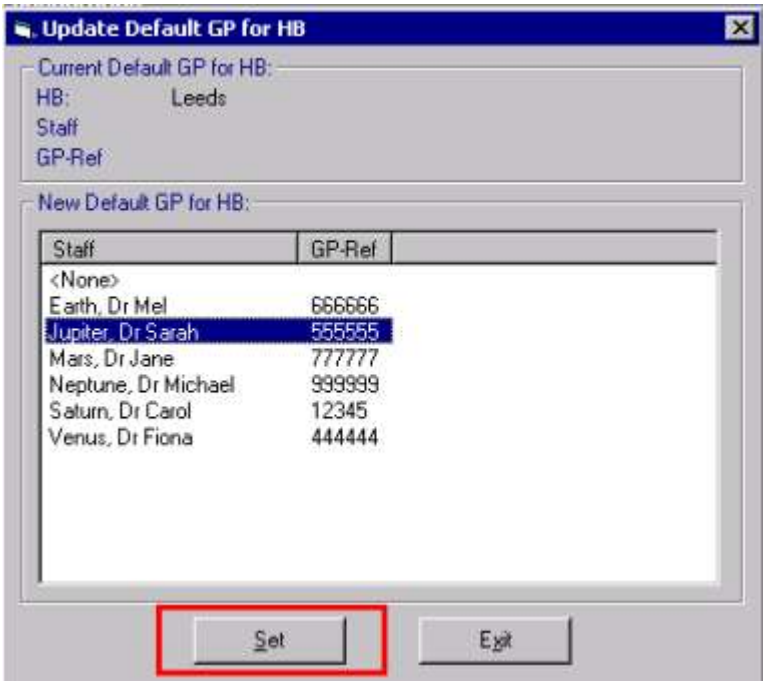


Figure 16: Configuration - Default GP for HB selected

4. Click **Update** and when prompted to save the changes click **OK**.
5. Click **Exit.**

Place of Birth

When registering a new patient you either have to enter an NHS/CHI/H+C Number or a Place of Birth. To avoid patients being registered incorrectly tick the Warn user of missing Place of Birth option

so that if the Place of Birth is bypassed a warning message appears. By default the option is deselected.

Click **Update** and **OK** to save the changes. Click **Exit** to close the form.

Previous Address

To save time when registering new patients, the following options are selected by default:

New Registration option to Transfer family "Previous address" record
Populate New Registration "Registration Links" Previous address

Figure 17: Configuration - Previous Address

- **New Registration option to Transfer family "Previous address" record** - if this is ticked, when adding a new patient to an existing or selected patient, the previous address is taken from the Previous Registered Address on the Family tab in Registration.

Figure 18: Registration - Family - Previous Address

- **Populate New Registration "Registration Links" Previous address** - if this is ticked, when adding a new patient to an existing or selected patient, the previous address is taken from the Registration tab in Registration.

For practices in England using their Smart cards, the previous address is taken from the National Spine. For other areas, or where the Spine is not used the address can either be taken from the previous address on the Family tab or from the details of the new patient Registration.

Click **Update** and **OK** to save the changes. Click **Exit** to close the form.

Remove Title Master

If you do not want the title master as an option whilst in the patient's registration screen, leave the tick in the box Remove Title - Master . Deselecting this box allows the title of master to be chosen. If you untick the box an Update prompt appears confirming that changes have been made, click OK followed by Exit to close the form.

> **Note** - For practices in England who are using Smartcards and are connected to the Patient Demographic Spine (PDS), it is recommend that you leave the tick in this box as the Spine does not recognise the title master.

Display IOS Registration Forms

You can remove the Items of Service prompt from appearing in Registration. If your practice no longer claims for new patient checks, we recommend you switch the prompt off. Remove the tick from Display IOS Registration Forms and click Update. A message appears confirming changes have been made, click OK followed by Exit to close the form.

Assign Smartcard - England

Before new Smartcard users can login to Vision, their Smartcard must be assigned to a Vision profile or a new Vision profile created for the Smartcard user. You will need the new users Smartcard to do this.

1. In Control Panel, go to File Maintenance.

> **Note** – You should login to Vision offline to do this. See Reset Password – if user forgets password if you cannot remember your offline password.

2. Next, click on **Actions – Assign Smartcard**.

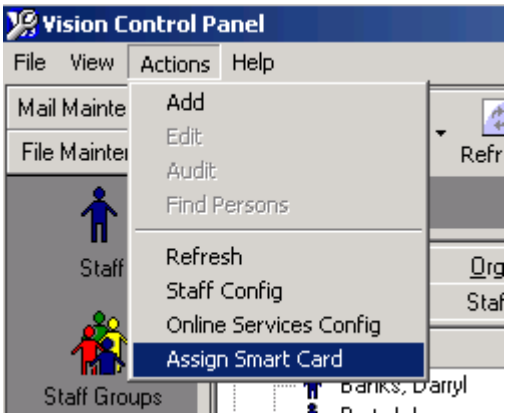


Figure 19: File Maintenance – Actions – Assign Smartcard

3. Insert the new users Smartcard when prompted and click OK.
4. Enter the passcode for the Smartcard.
5. You are then presented with a list of Vision users. Click on the matching user and press Select. Please ensure that you select the correct user.
6. If the user is not on the list, you can click on Add User… to create a new Vision profile.
7. You are prompted with the following message "Warning: If you have used Vision at this practice before, and your name is not in the list, then you are advised to contact the system supervisor if this is the case and NOT create a new user. Continue to create a new user?"
8. A new staff record will be created in File Maintenance – Staff using the available SDS details (mandatory fields are surname, forename, title, sex, role, mnemonic and a unique id). For prescribing, the following is required: GMP Code, Prescriber number, formulary, Supplementary Prescriber flag and Responsible GP.

> **Note** – For Locums, an SDS search is performed to obtain their external prescribing number. Where this is not retrieved, you can enter this manually in File Maintenance – Staff.

See Single Sign On (SSO) On-screen help for further information on Smartcards.

Vision Online Services Configuration

Vision Online Services (VOS) have been developed to expand the services practices offer to patients. The following sections in Control Panel on-screen help detail the setup of Online Appointments and Online Repeats.

> **Note** - Staff must have System Manager (Full) access in Vision - Control Panel to enable and configure VOS. (England Only – see *RBAC User Guide* (*http://www.inps4.co.uk/downloads/cfh/rbac27v3*) for further details).

To Activate VOS:

1. Go to **Vision - Management Tools - Control Panel** – **File Maintenance**.
2. Click the **Online** icon, or select **Actions – Online Services Config.**
3. This will open the Vision Online Services screen. Click the **Enable Vision Online Services** box to enable VOS.

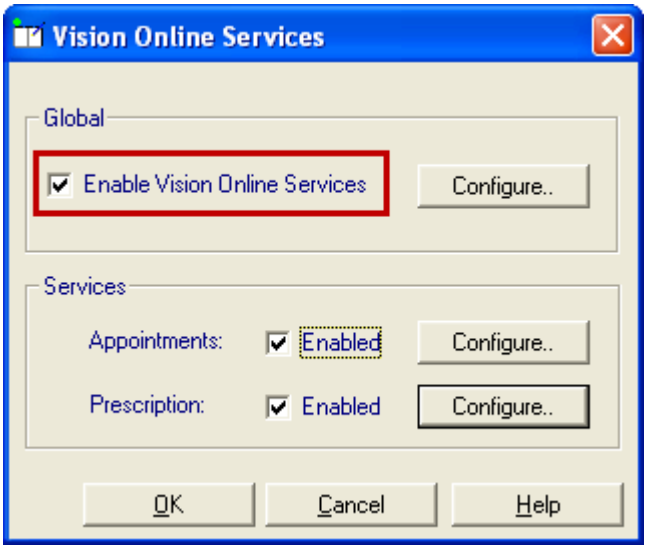


Figure 20: Vision Online Services Configuration

> **Note** – Only those modules you have purchased are available online.

4. You now need to configure the global settings, see *VOS Global Configuration* (page 112).

See also *Enabling Online Appointments* (page 118) and *Enabling Online Repeats* (page 138).

VOS Global Configuration

The following three global tabs require configuring:

- **Welcome Message –** Create a message displayed on the VOS home page following successful login by the patient.
- **Registration –** Set global invalidation options for unused registration letters and un-activated accounts.
- **NHS Mail –** For English and Scottish practices with NHS Mail, there is a new facility to add an NHS mail account, which is then used to send confirmation

and reminder emails and SMS messages to patients. A global email signature can also be created.

Welcome Message

A practice welcome message is displayed on the home page of the Vision Online Services web page following successful login by the patient. This is defined by the Practice. Welsh practices have the option to display the message in English and Welsh.

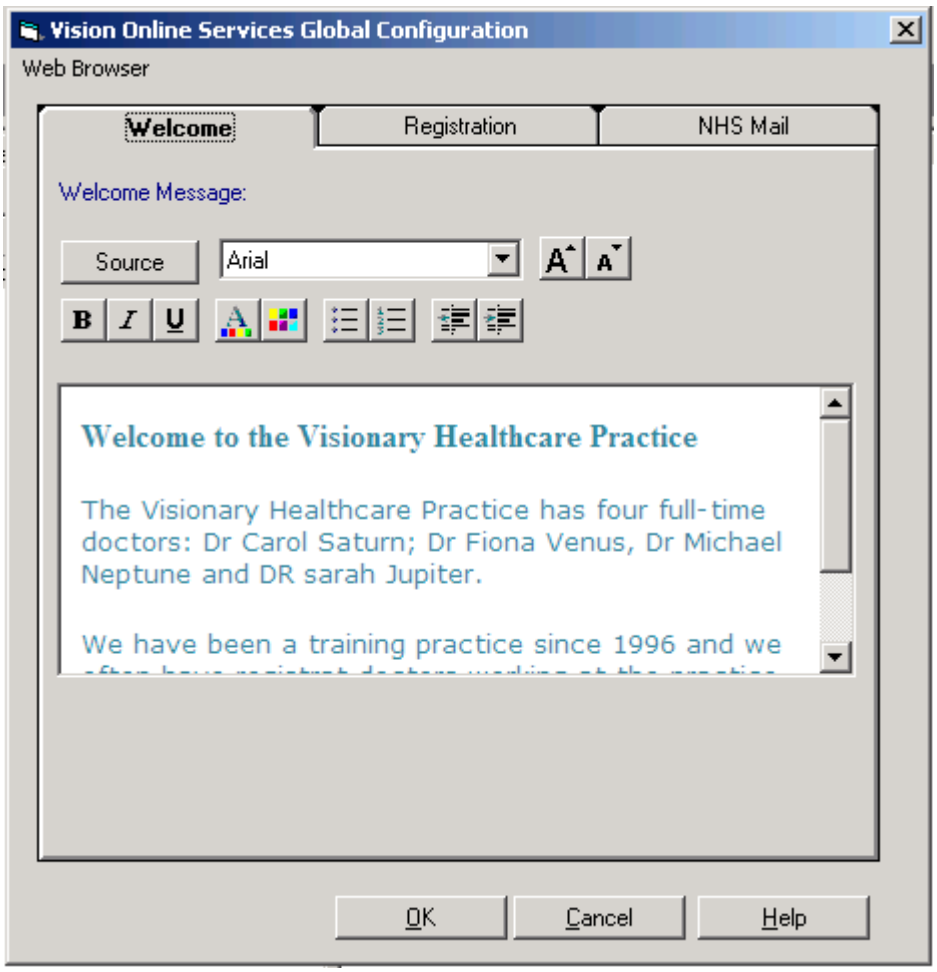
Adding a Welcome Message

The welcome message is displayed on the home page of the website following a successful login by your patients.

1. From **Control Panel – File Maintenance,** select **Actions – Online Services Config.** In the Global section click the **Configure**

button.
2. Select the **Welcome** tab to display the Welcome Message displayed on the home page of the website.
3. Type your message in the welcome message window using the formatting editor provided. See *Using the Message Editor* (page 143).

   If you prefer, you can customise your welcome message source using HTML formatting tags (see Formatting HTML Messages).



Online Global Configuration - Welcome Message

4. Click **OK** to save.

Adding a Welcome Message - Wales

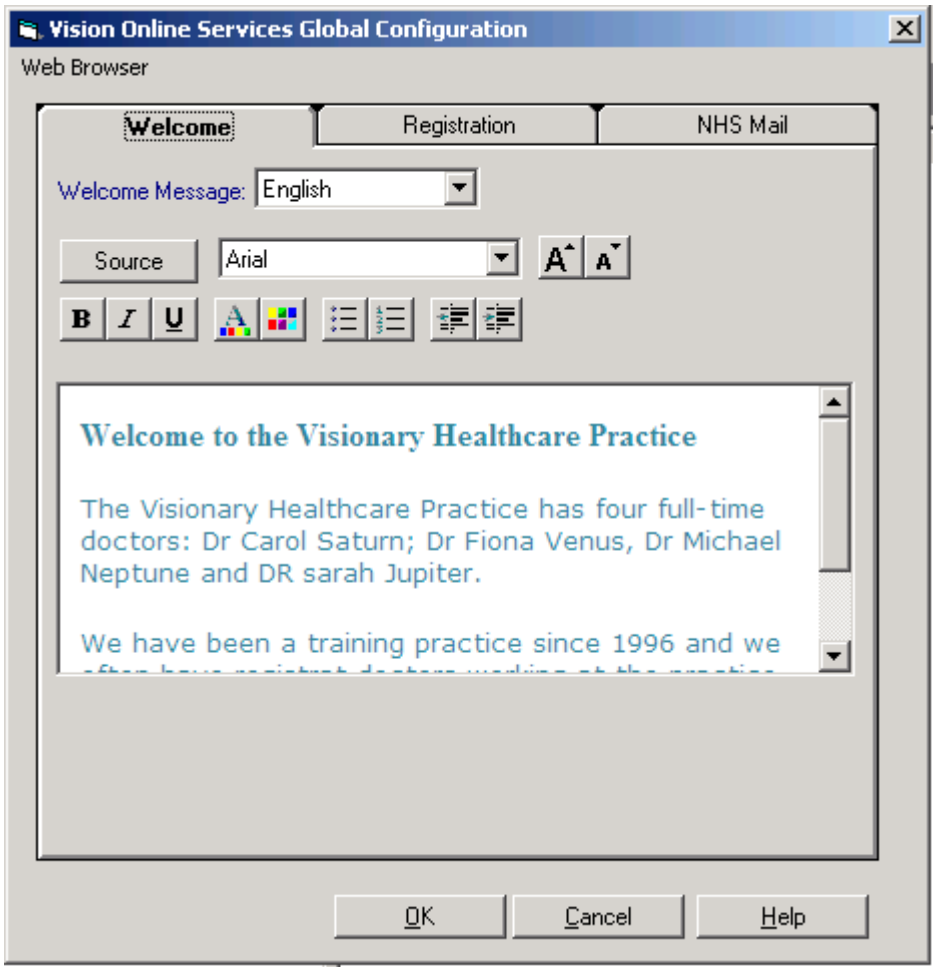
The welcome message is displayed on the home page of the website following a successful login by your patients.

1. From **Control Panel – File Maintenance,** select **Actions – Online Services Config.** In the Global section click the **Configure** button.

2. Click to open the **Welcome** tab.

   To add your message to the English verison of My Health Online:
3. Select **English** from the dropdown list.
4. Type your message in the welcome message window using the formatting editor provided. See *Using the Message Editor* (page 143).

   If you prefer, you can customise your welcome message source using HTML formatting tags (see Formatting HTML Messages).



Online Global Configuration - Welcome Message

   To add your message to the Welsh verison of My Health Online:
5. Selecting **Welsh** from the dropdown list.
6. Type your translated Welsh message into the Welcome Message window.

   You now have an English and Welsh version of the welcome message.

7. Click **OK** to save.

Registration

From the registration tab you can set a time period for when unused registration letters and un-activated accounts are automatically invalidated. There are also options to enable reminders for registration to be sent by email or by SMS.

Invalidate unused registration letters after

This enables you to set a expiry date for Registration letters, the expiration date will be printed on the patients' registration letter. The patient has until the expiry date to register for Online Services. Once the date has passed the registration letter cannot be used, the patient will need to collect a new registration letter and re-register for Online Services

Invalidate Un-activated accounts after

This enables you to set an expiry date for patients to activate their Online Account. On registering patients are sent a Confirmation Code which activates their account. If they fail to activate the account by the expiry date, they

will need to re-register for Online Services. If their registration letter has also expired they will require a new registration letter.

> **Reminder** - To change the date, type the number required followed by D (days), W (weeks), M (months), or Y (years), eg to change date to two months type 2m.

Reminders

Send Activation Reminders by Email – Tick this to send reminders to patients by email, to remind them to activate their Online Account.

> **Note** - By default this service is ticked to enable the service. If you do not want to send email messages remove the tick from the appropriate box.

If ticked to use the service, the NHS Mail settings need to be configured. See *NHS Mail* (page 115).

NHS Mail

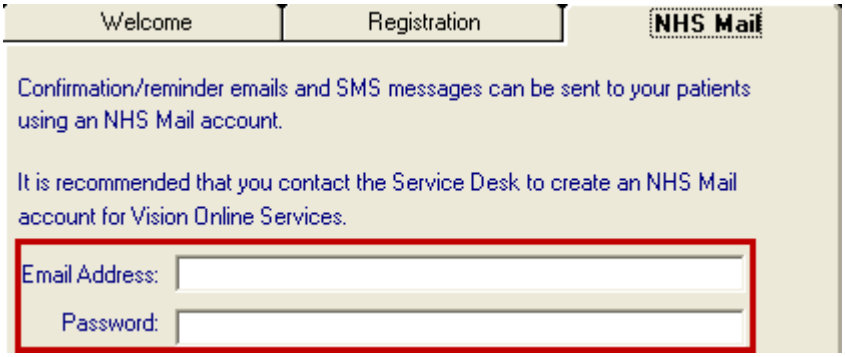
Practices in England and Scotland can configure VOS to send reminder emails and/or SMS messages to their patients. This is used to remind them to setup their user account and to remind them of appointments they have booked for example.

For practices who do not have/do not want to use an NHS Mail account, you cannot send SMS messages. However, account confirmation, password reset and appointment confirmation and reminder emails are automatically sent to the patients' email address via the VOS Gateway.

NHS Mail Setup

It is advised that you request a new NHSMail account from your Service Desk at the PCT/HB which is specifically used for VOS.

Once you have the new NHSMail Account details, type the email address in the **Email Address** box for example visiononlineservices@G12345.nhs.uk, then type the **Password.**


Welcome
Registration
NHS Mail
Confirmation/reminder emails and SMS messages can be sent to your patients using an NHS Mail account.
It is recommended that you contact the Service Desk to create an NHS Mail account for Vision Online Services.
Email Address:
Password:

VOS Global Configuration – NHS Mail – Email Address

Note - NHSMail account passwords expire every 90 days. After 60 days an email is sent daily to the mail account with a countdown to expiration. You **MUST** reset the password, before it expires. If the password is not reset, the mail account will be **Locked,** this will prevent email and SMS messages being sent to patients.

REMINDER - When you have changed the NHSMail password go to **Control Panel - File Maintenance - Actions - Online Services Config - Global - NHS Mail** and change the password.

Resetting NHS Mail Password

NHS Mail account passwords expire every 60 days, an email is sent to the Mail account prior to expiration. You **MUST** reset the password, before it expires. If the password is not reset the Mail account will be **Locked**; this will prevent email and SMS messages being sent to patients.

Reminder – When you have changed the NHS Mail password go to Control Panel – File Maintenance – Actions – Online Services Config – Global – NHS Mail and change the password.

Enable SMS

Once you have setup your NHS Mail account, the SMS messaging is enabled by default. To disable SMS messaging remove the tick from the **Enable SMS** box.

Figure 21: VOS Global Configuration – NHS Mail – Enable SMS

Test Email and SMS Messaging

To enable SMS messaging ensure there is a tick in the **Enable SMS** box.

Once setup you can test the details to make sure they are working.

To Test Email Settings

From Control Panel – Online Services Config – Global Configure, select the NHS Mail tab.

Click the Test Email

button, the Send Test Email box opens.

Enter your email address (or the email address for the person you want to receive the test message), then click Send.

You are prompted: *An email has been sent using the setting you provided. Please verify the email was received successfully.* Click OK to close.

Check your email inbox for a test email, confirming that the NHS Mail account is configured correctly.

To Test SMS Settings

1. From **Control Panel – Online Services Config – Global Configure**, select the **NHS Mail** tab.
2. Click the **Test SMS**

button, the **Send Test SMS** box opens.
3. Enter the **phone number** you wish to receive the test message to, then click **Send**.
4. You are prompted: *SMS message has been sent using the setting you provided. Please verify the SMS was received successfully.* Click **OK** to close.
5. Check your phone for a test SMS message, confirming that the NHS Mail account is configured correctly.

Email Signature - All Countries

You can add an email signature to all emails send to patients for Vision Online Services. To create a signature type the details in the **Email Signature** box, click **Preview** to check.

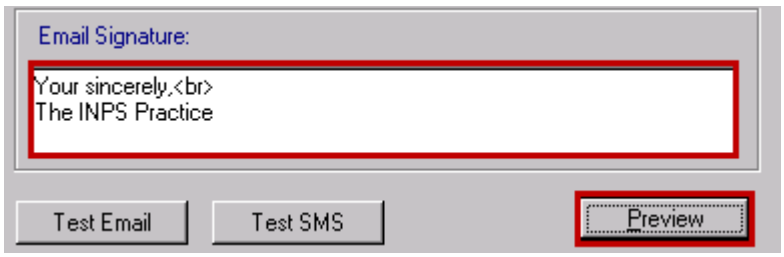


Figure 22: Email Signature

You have now Activate VOS and now need to configure the individual modules.

- To activate and configure Online Appointments, see *Enabling Online Appointments* (page 118).
- To Activate and configure Online Repeats, see *Enabling Online Repeats* (page 138).

Enabling Online Appointments

> **Note** - Staff must have System Manager (Full) access in Control Panel and Full access to Vision Appointments, to enable and configure Vision Online Appointments. (England Only – You need the relevant RBAC rights on your Smartcard to access VOS Configuration. See *RBAC User Guide* (*http://www.inps4.co.uk/downloads/cfh/rbac27v3*) for further details).

To Activate Online Appointments:

1. Go to **Vision - Management Tools - Control Panel** – **File Maintenance**.
2. Click the **Online** icon, or select **Actions – Online Services Config.**

   This will open the Vision Online Services Configuration screen. VOS should be enabled and a welcome message added (if required), see "Enabling Vision Online Services".
3. Tick the Appointments **Enable** box in the Services section. This gives you access to tools to customise Online Appointments on the website.

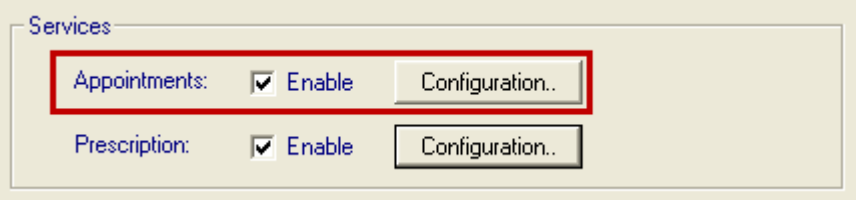


Figure 23: Enable Services - Configuration

4. Click the **Configuration** button to customise how appointments will work for your practice. There are eight tabs which require attention. See "*Configure Online Appointments* (page 118)".

Configure Online Appointments

> **Note** - Staff must have System Manager (Full) access in Control Panel and Full access to Vision Appointments, to enable and configure Vision Online Appointments. (England Only – You need the relevant RBAC rights on your Smartcard to access VOS Configuration. See *RBAC User Guide* (*http://www.inps4.co.uk/downloads/cfh/rbac27v3*) for further details).

You now need to determine which staff and sessions are available on the VOS website and setup how you want Online Appointments to work for your patients. There are seven tabs that need your consideration, see links below.

You will need to revisit Appointments Configuration when a new clinician joins your practice. You can also make changes to the Sessions available. However, you need to modify books in Vision Appointments for any changes to be shown.

General Tab

The General Tab enables you to setup the following two tools for Online Appointments:

- Appointments Message (see *Appointments Message* (page 119) and *Appointments Message - Wales* (page 120))
- *Did Not Attends (DNA's)* (page 121)

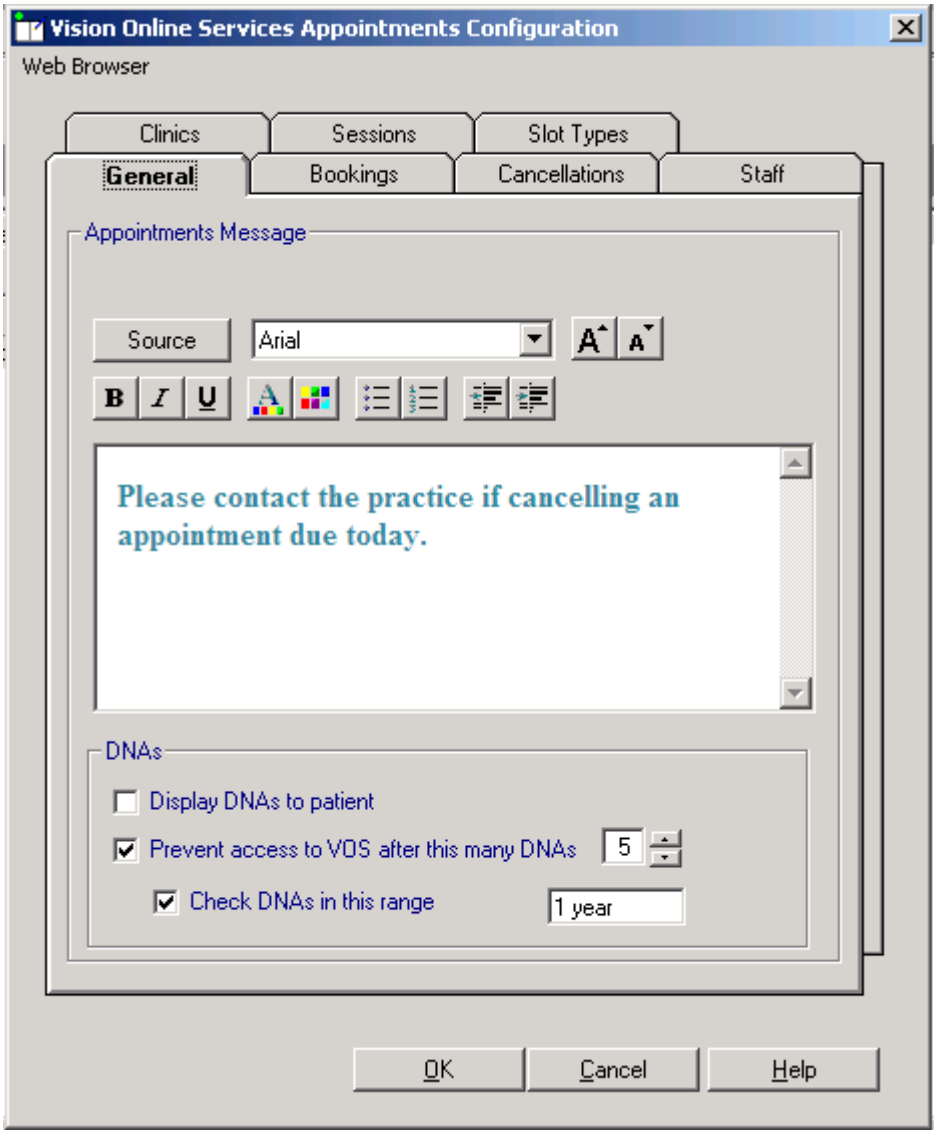
Appointments Message

This is a practice specific message which is displayed on each Online Appointments web page.

Add Appointments Message

1. From **VOS Appointments Configuration** select the **General** tab.
2. Type your message in the Appointments Message window using the formatting editor provided. See *Using the Message Formatting Editor* (page 143).

   If you prefer, you can customise your prescription message source using HTML formatting tags (see Formatting HTML Messages).



Online Appointments Configuration - Appointments Message

3. Click **OK** to save.

Appointments Message - Wales

This is a practice specific message which is displayed on each Online Appointments web page. This message must be added in Welsh (for the Welsh version of the website) and English (for the English version).

> **Note** - The patient chooses the language in which they want to view My Health Online from the front screen, before they log in. If they choose Welsh (Cymraeg), they will see the Welsh version of the appointments message entered by the practice.

Fy Iechyd Ar-lein
My Health Online
Cymraeg | Skip Navigation | Terms of Use | Privacy Policy | Help
GIG CYMRU NHS WALES
Gwasanaeth Gwybodeg Informatics Services
Home
My Account
FAQs
You are here: My Account > Appointments
Logout
My Account
Appointments
My Profile
Appointments
Please contact the practice if cancelling an appointment due today.
Existing Appointments
The list below displays all the appointments that you currently have booked.
Date
Time
Clinician/Clinic
Location
Fri 21 Jan 2011
10:00 AM - 10:10 AM
Carol Saturn
The INPS Practice
Details | Cancel
Fri 21 Jan 2011
11:30 AM - 11:40 AM
Michael Neptune
The INPS Practice
Details | Cancel
You have reached the maximum number of bookings allowed. No further bookings can be made at this time. Click here for more information.

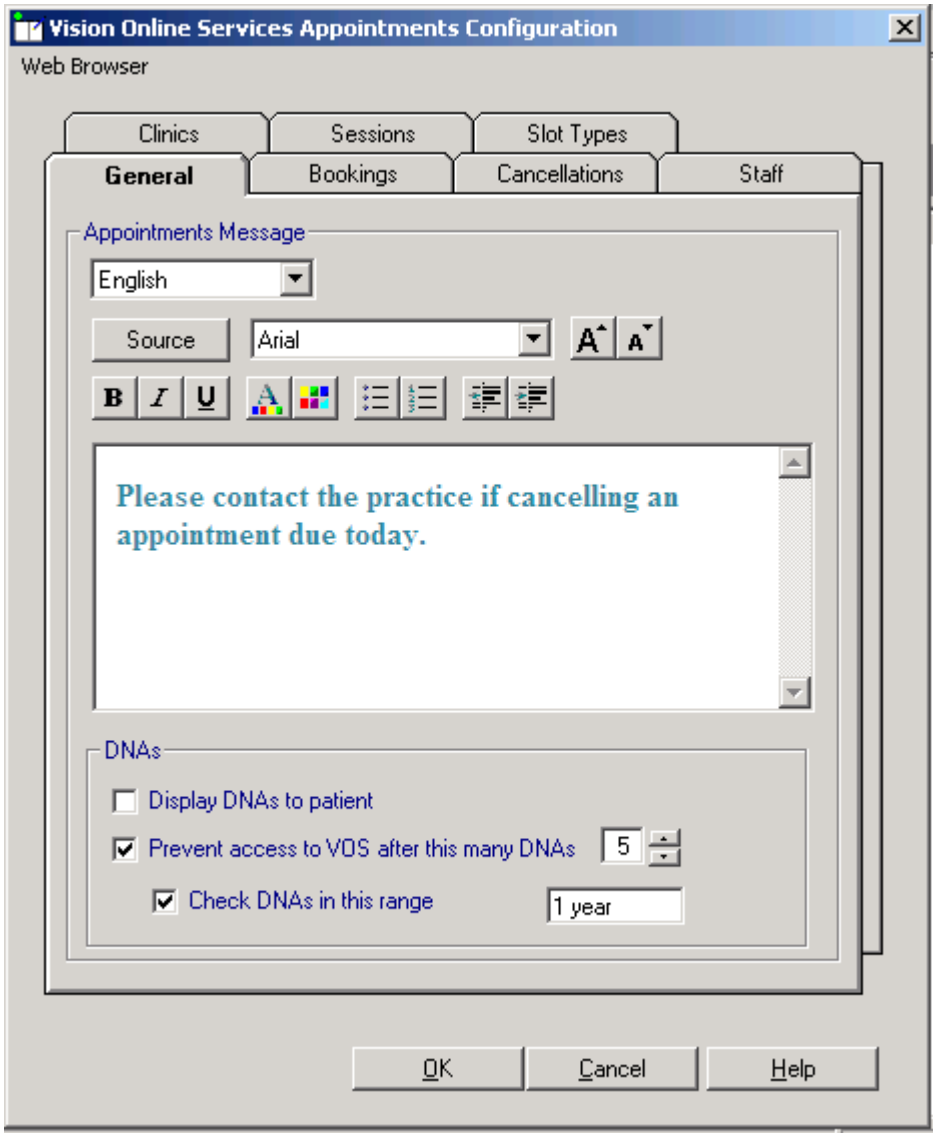
Add Appointments Message - Wales

1. From the Vision Online Services **Appointments Configuration** screen, select the **General** tab.
2. Select **English** or **Welsh** from the drop-down list.

> **Note** - selecting English allows you to enter the message to be displayed in the English version of My Health Online. Choosing Welsh allows you to enter the message for the Welsh version.

3. Type your message in the Appointments Message window (in the appropriate language) using the formatting editor provided. See *Using the Message Editor* (page 143).

If you prefer, you can customise your prescription message source using HTML formatting tags (see Formatting HTML Messages).



Online Appointments Configuration - Appointments Message

4. Choose the next language and type the translation of your text.
5. Click **OK** to save.

Did Not Attends (DNAs)

The DNA section has the following options:

Display DNAs to patients - When ticked patients registered for Online Appointments can view their previous DNA's appointments. This is deselected by default.

> **Note** - Practices who use the Appointments module as a messaging utility should be aware that messages may count as DNA'd appointments if they have not been marked as seen. The patient will be able to see the erroneous DNA count if the option is ticked.

Prevent Access to VOS after this many DNAs - Use the up/down arrows to select a number between 1 and 99, this being the total number of DNAs permitted before the patient's access to Online Appointments is disabled.

> **Note** - This does not have any impact on Online Repeats and the patient should be able to access this as usual.

Check DNAs in this range - A date range can be specified if required (optional), this limits the number of DNA's required to the time period, eg If the patient has more than 5 dna's in one year their user account will be disabled. To add the date, type the number required followed by **D** (days), **W** (weeks), **M** (months), or **Y** (years), eg to change date to six months type **6m.**

Bookings Tab

This tab enables you to manage new and existing appointment bookings.

Maximum Appointments Allowed

You need to set how many outstanding appointments the patient is allowed to have booked at any one time. By default this is set to 0 appointments. However, you may change this to any number between 1 and 99.

> **Note** - If you set the number of appointments to 0, the patient can book as many appointments as they wish.

Figure 24: Maximum Outstanding Appointments

When you set a limit on the number of appointments outstanding, once this number is then reached, the patient will receive a message which states: "*You have reached the maximum number of bookings allowed. No further bookings can be made at this time.*"

> **Note** – This includes appointments booked at the Practice or Online.

To book a further appointment they would need to either:

- Contact the Practice and arrange an appointment with the practice.

- Or cancel one of the booked appointments the patient already has which will then allow the patient to book a further appointment.

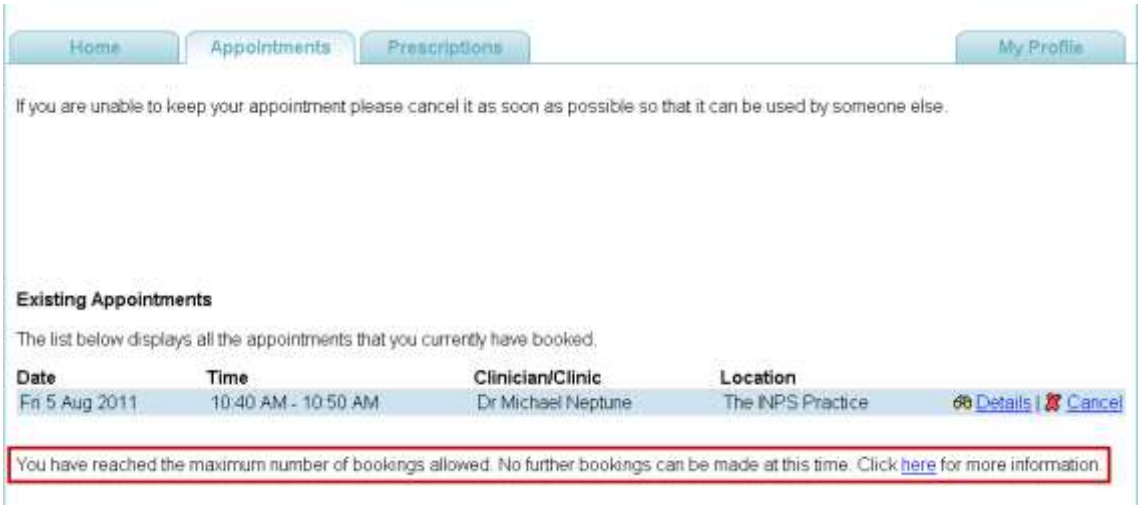

Home
Appointments
Prescriptions
My Profile
If you are unable to keep your appointment please cancel it as soon as possible so that it can be used by someone else.
Existing Appointments
The list below displays all the appointments that you currently have booked.
Date
Time
Clinician/Clinic
Location
Fri 5 Aug 2011
10:40 AM - 10:50 AM
Dr Michael Neptune
The INPS Practice
Details | Cancel
You have reached the maximum number of bookings allowed. No further bookings can be made at this time. Click here for more information

Figure 25: Maximum Appointments Reached

How Far in the Future can Appointments be Booked

Define a date period here to set how far in advance patients using Online Appointments can book. To add a date, type the number required followed by **D** (days), **W** (weeks), **M** (months), or **Y** (years), eg to change date to two months type **2m**.

Figure 26: Future Appointments

Allow Weekend Bookings

Use this tool to determine if weekend slots are available or not.

Figure 27: Allow Weekend Bookings

When ticked, all weekend slots reserved for web are available to patients, when unticked all the slots are unavailable.

Display Appointment Duration

When booking an online appointment the start time is displayed, when **Display Appointment Duration** is ticked this option displays the appointment end time as well, therefore, displaying the duration to the patient.

Figure 28: Appointment duration

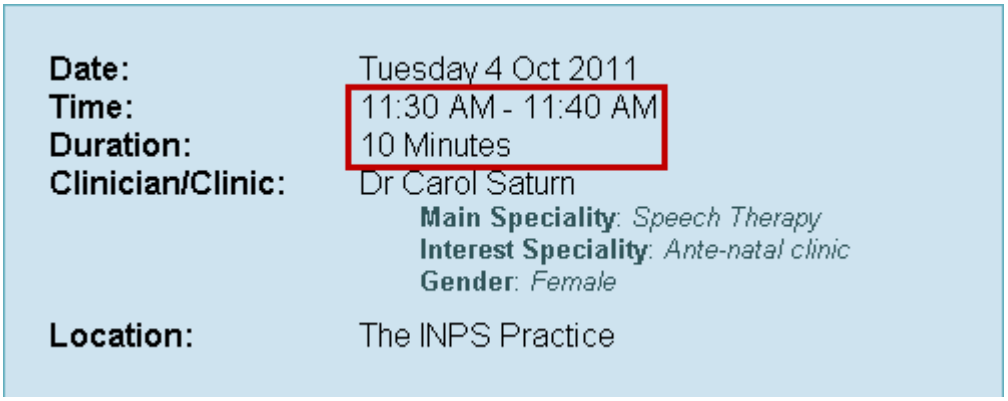


Figure 29: Online Appointment Details – Appointment Duration

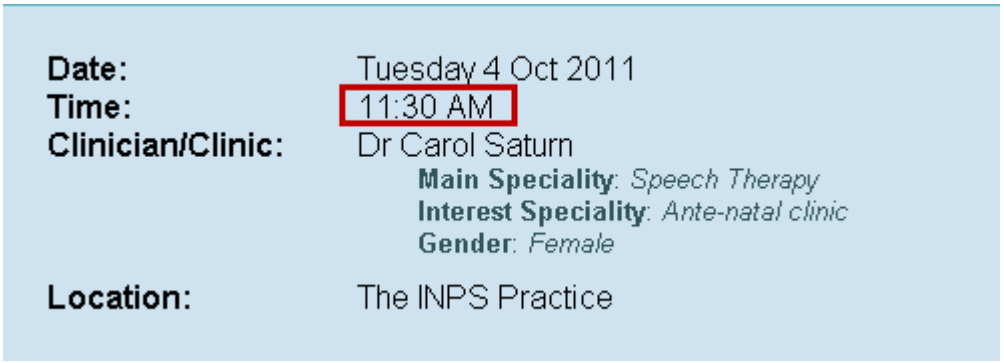


Figure 30: Online Appointment Details – No Appointment Duration

Booking Confirmation and Reminders

Tick the boxes to allow email and/or SMS messages to be sent to patients when booking appointments either online or at the practice.

> **Note** – SMS messaging is not available in My Health Online (Wales).

If you want the patient to have a reminder prior to their booked appointment tick the **Send Email Reminders** and/or **Send SMS Reminders,** add a date when the reminder is to be sent, type the number required followed by **D** (days), **W** (weeks), **M** (months), or **Y** (years), eg to send a reminder two days before their appointment type **2d**.

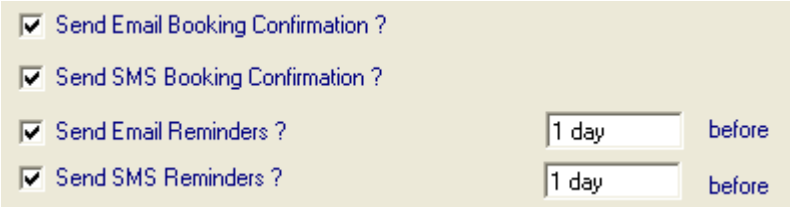


Figure 31: Booking Confirmation & Reminders

Booking Reason

The Booking Reason is the freetext comment added by staff when making an appointment to advise the clinicians why the patient is attending. This option enables you to make that reason available to VOS users when viewing existing appointments, booked at the practice. Tick the **Display Reason for booking for existing appointments** box to allow access to the booking reason. Tick the **Allow Reason to be edited** box if you want patients to be able to edit the reason (optional), remove the tick to prevent patients editing the reason.

Figure 32: Booking Reason

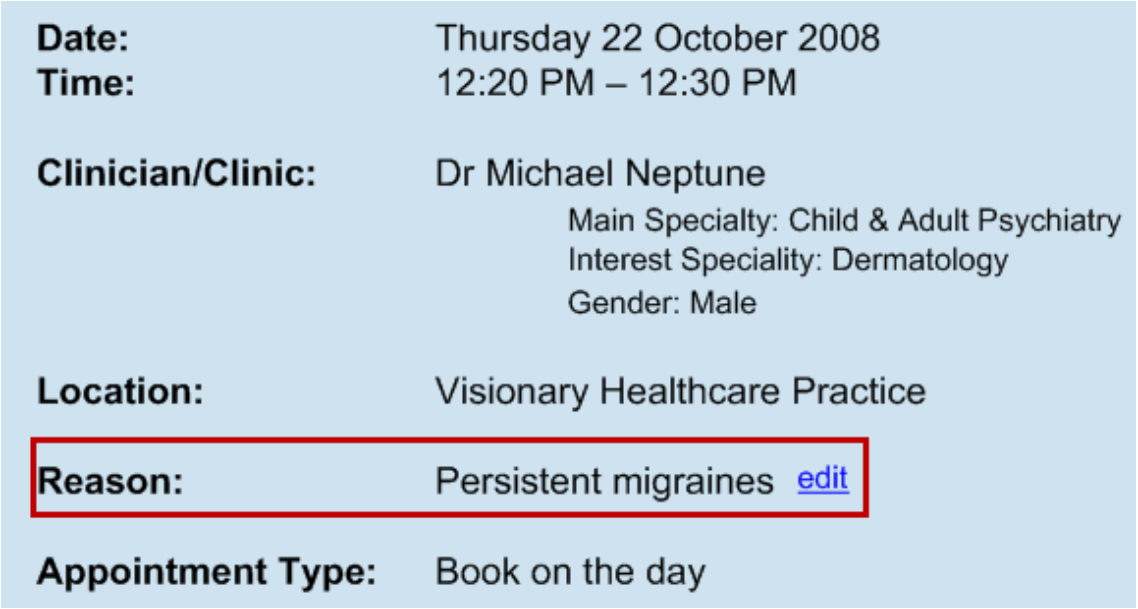


Figure 33: Online Appointment Details – Editable Booking Reason

Cancellations Tab

The Cancellation Tab is used to set a time period for cancelling appointments, determining if email and SMS confirmation messages are sent and adding Cancellation Reasons.

Cancellation Settings

You can set a cut-off time period, after which the patient cannot cancel booked appointments online. To set a time period click in the **hours** box and add a number between 0 and 999, eg 24 hours (one day), click in the **mins** box (if required) and add a number between 0 and 59.

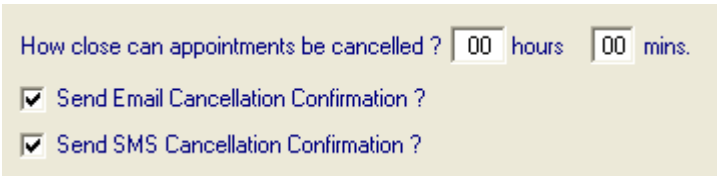


Figure 34: Cancellation Settings

It you want the patient to be sent an Email and/or SMS message tick the appropriate boxes.

If a patient attempts to cancel an appointment during the cancellation cut-off period they are advised: "*This appointment cannot be cancelled online. Please contact your GP Practice".*

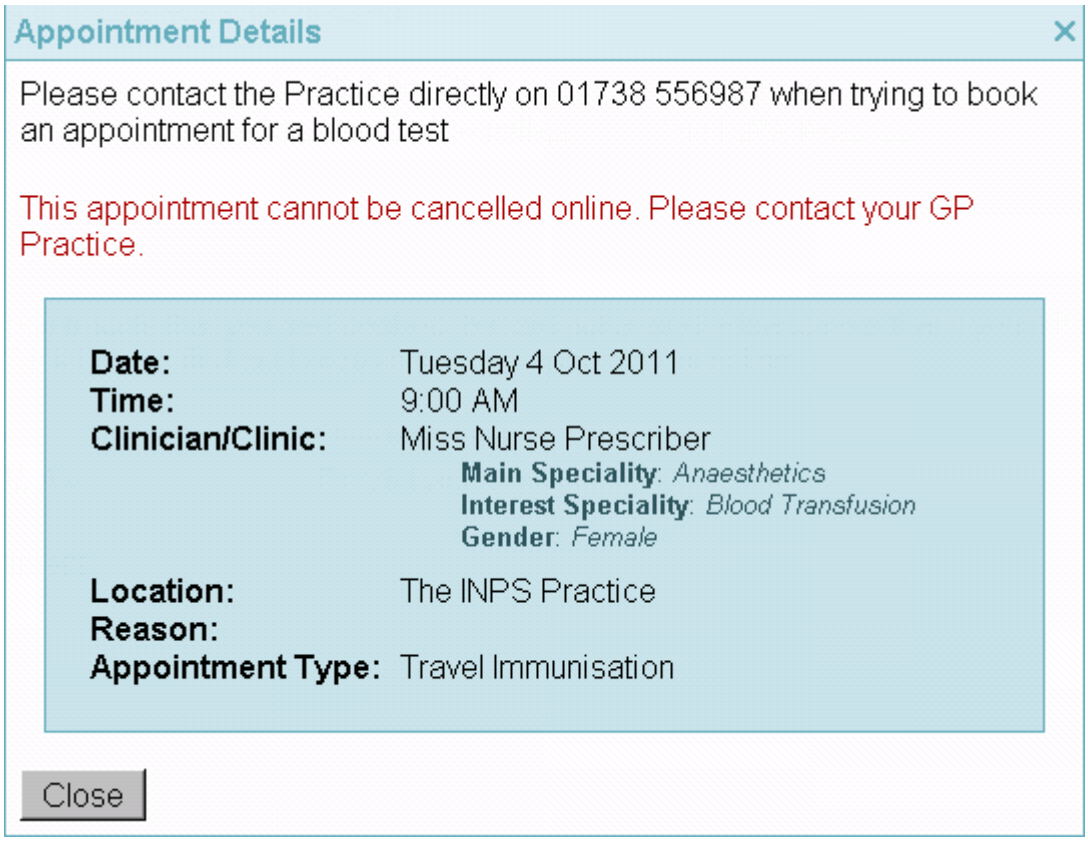

Appointment Details
Please contact the Practice directly on 01738 556987 when trying to book an appointment for a blood test
This appointment cannot be cancelled online. Please contact your GP Practice.
Date: Tuesday 4 Oct 2011
Time: 9:00 AM
Clinician/Clinic: Miss Nurse Prescriber
Main Speciality: Anaesthetics
Interest Speciality: Blood Transfusion
Gender: Female
Location: The INPS Practice
Reason:
Appointment Type: Travel Immunisation
Close

Figure 35: Appointment Details – Cannot Cancel

Cancellation Reasons

When cancelling appointments online, patients are presented with a list of cancellation reasons to select from. This facility enables you to change the text used by practice staff to something more appropriate for patients. You can also a default cancellation reason and change the order in which they are presented to the patient.

All cancellation reasons added in Vision Appointments are shown here. To add new cancellation reasons go to Vision Appointments.

Add Alternative text

1. From VOS **Appointments Configuration** select the **Cancellations** tab.

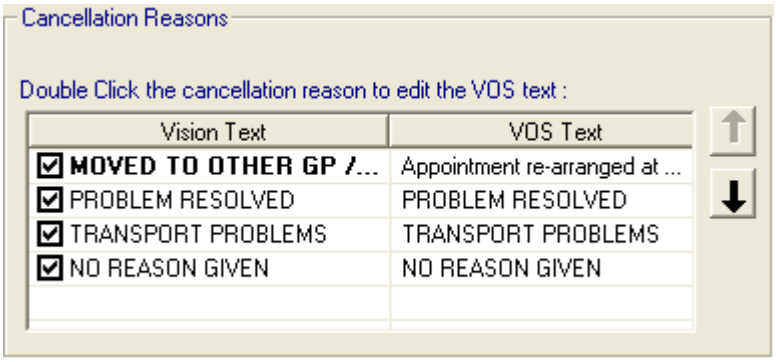


Figure 36: General Tab - Cancellation Reasons

2. Double click the cancellation reason; this opens the "VOS change VOS Text" window.

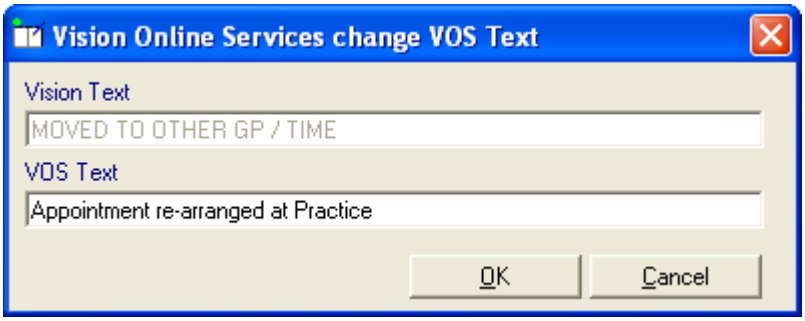


Figure 37: VOS change VOS Text

3. Type the alternative text in the VOS text window.
4. Removing the tick from the tick box hides that cancellation reason from the patients online.

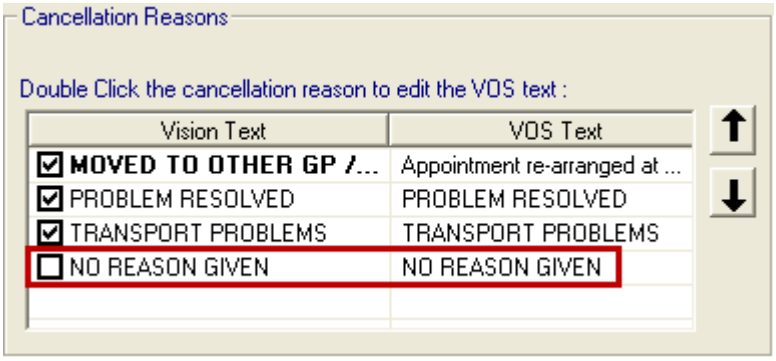


Figure 38: Cancellation Reasons – Reason Deselected

5. The order of the displayed Cancellation Reasons can be changed using the up and down arrows. First highlight the reason you wish to move, then use the arrows to move it to the required position in the list.

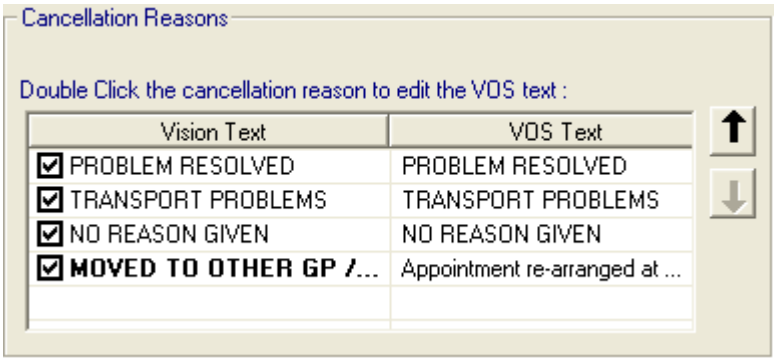


Figure 39: Cancellation Reasons – Positions changed

6. To set one of the cancellation reasons as the default, highlight the required reason and right click, select **Set Default.**
7. Click **OK** to save and close.

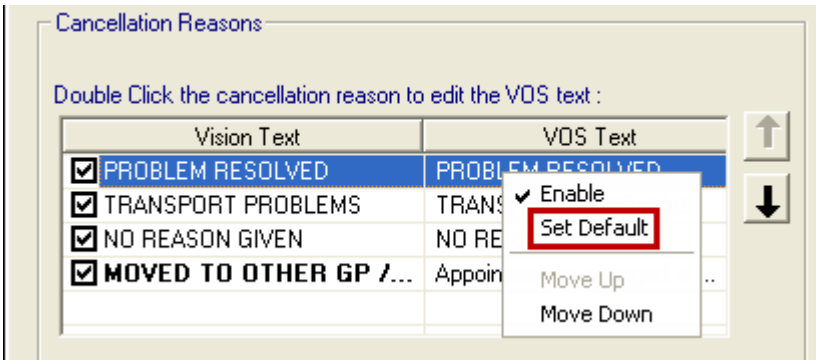


Figure 40: Cancellation Reasons – Set Default

Note – The default can be changed; right click and select Remove Default.

Staff Tab

Staff Setup

In order for patients to be able to book appointments, you first need to determine which members of staff are available within Vision Online Appointments.

1. On Vision Online Services Appointments Configuration screen, select the Staff tab.
2. Use the radio buttons to determine which staff your patients will be able to book appointments with on the Vision Online Appointments website.
3. You can use the radio buttons to select:
   - **All Staff** – All active appointment book owners.
   - **Usual GP** – Includes only those GPs recorded as Usual GP in patient registration.

- **Salaried GP** – Includes those GPs set as Salaried GPs in File Maintenance.

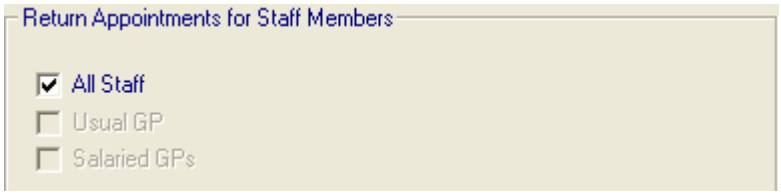
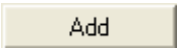


Figure 41: Staff Tab – Radio Buttons

IMPORTANT – Use the radio buttons OR setup staff individually. Do not use both setup options.

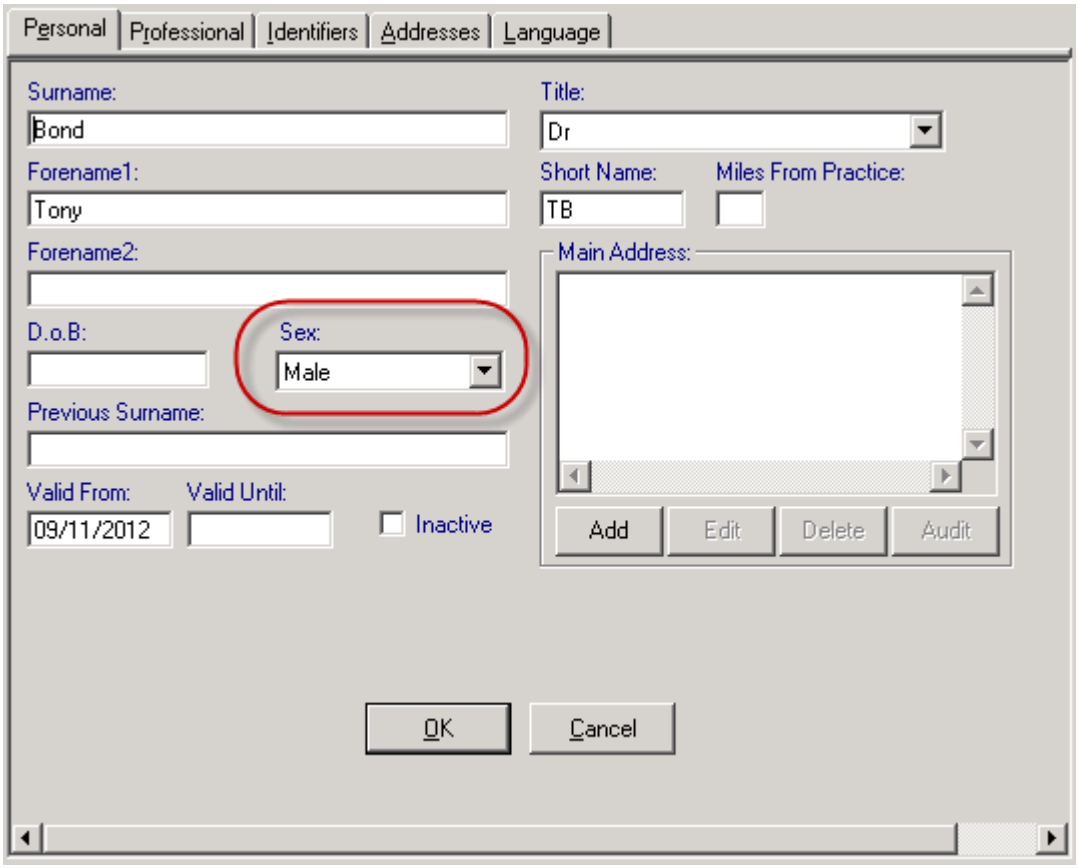
4. Alternatively, you can setup members of staff individually, remove the tick from the All Staff box, then click the Add 

button. This will display a drop-down menu listing all clinical staff from the File Maintenance list.
5. Select the required clinician's name from the drop down list and click OK to close.
6. Click on the Add Button to repeat this process, continue until you have manually added all the required staff.
7. Click the Cancel button to finish adding staff.

Add Gender, Role, Special Interests and Lannguage

Online Appointments now displays the gender, role, special clinical interests and any consented, written and spoken languages to patients when they are selecting appointments. If the clinician has no other languages (other than English), no languages will be displayed online. This information is recorded in the **Staff** files in **File Maintenance.** Check the clinician's gender details recorded on the Personal file.

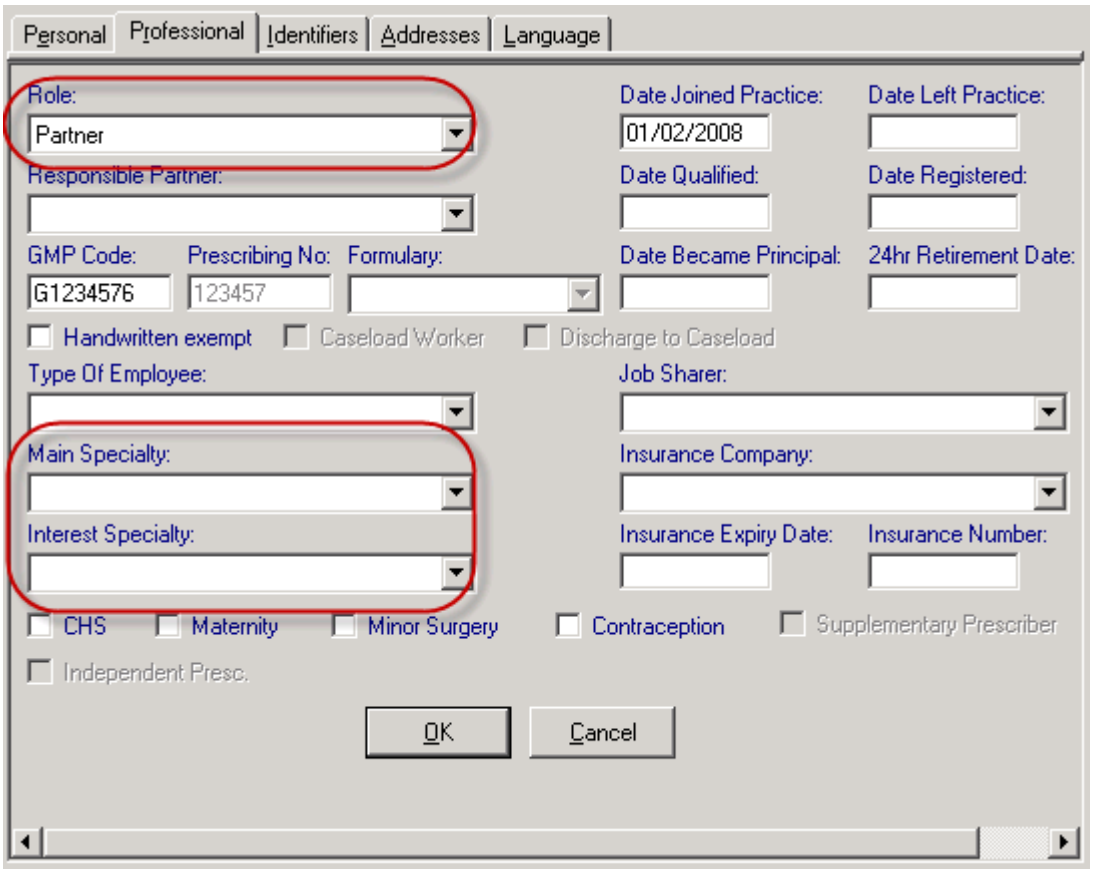
Personal Tab



Control Panel – Staff – Personal Details Tab

Professional Tab

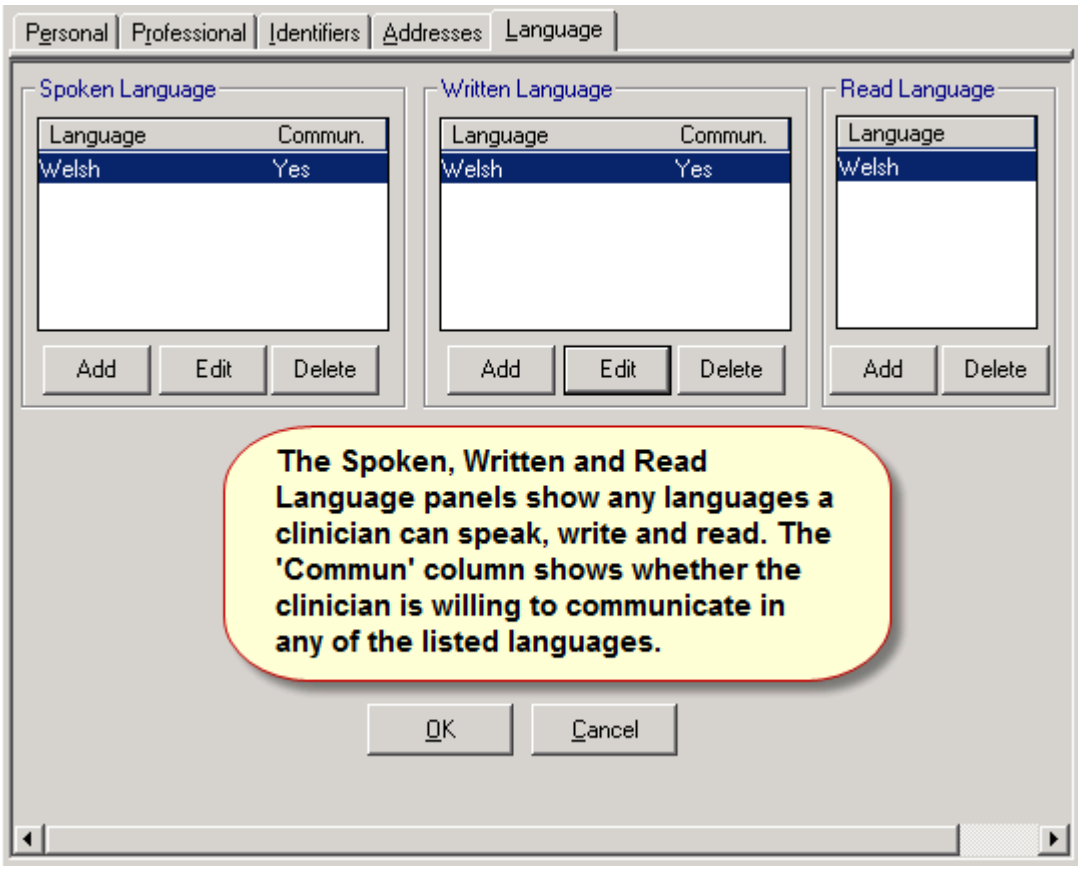
In the Professional tab you must select the Role (Mandatory), you also have the option to select the Main and Interest Speciality from the dropdown lists. These details, if recorded, are then displayed to patients when they are booking an appointment online.



Control Panel – Staff - Professional Tab

Language Tab

In the Language tab, you can record any written, spoken and read languages a clinician has and indicate whether or not they want to communicate to online patients in any of the written or spoken languages:



To set up any clinician languages see Add Clinician Language.

Add Staff Language

1. Click on Staff in the File Maintenance tab to list all staff members.
2. Right-click on the clinician and select Edit Staff to enable editing.
3. Click on the Language tab.
4. To record a spoken language, click on **Add** in the 'Spoken Language' section to open the Language screen.
5. Select the language from the dropdown list.
6. Click in the checkbox if the clinician is willing to speak in this language.
7. Click **OK** to confirm.
8. Follow the same process in the 'Written Language' section to record a written language.

   Note - Recorded spoken and written languages if consented, will be displayed to patients using online appointments.

9. To record a read language, click **Add** in the Read Language section.
10. Click **OK** to confirm.

Clinics

Clinics are created in Vision Appointments and enable you to setup sessions and book appointments, without the appointment book being linked to a staff member, for example flu clinics. You can determine which clinics are available on the VOS website.

> **Note** – To create and setup Clinics refer to Vision Appointments On-screen help.

Add Clinics

1. On Vision Online Services Appointments Configuration screen, select the Clinics tab.
2. By default the All Clinics box is ticked, so all clinics will be available to the website.
3. To change this to specific clinics only, click to remove the tick.

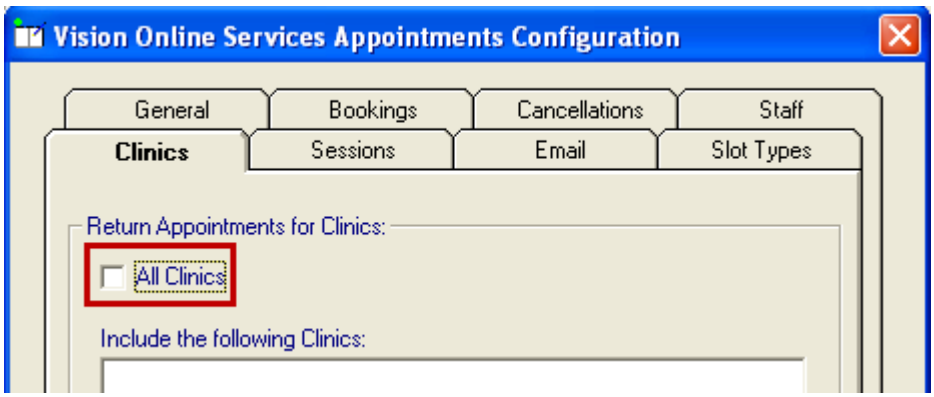


Figure 42: Clinics - Add

4. Click the **Add** button, the VOS Select Clinic window will open.

5. Select the required clinic from the drop-down list, click **OK.**
6. Repeat steps 4 and 5 until you have added all the clinics you require.
7. If you have selected all the clinics in the list you will be prompted: *"All available clinics have been added to the list."* Click **OK** to continue.

Remove Clinic

1. To remove a clinic from the list, click to highlight the required clinic, then click the **Remove** button.

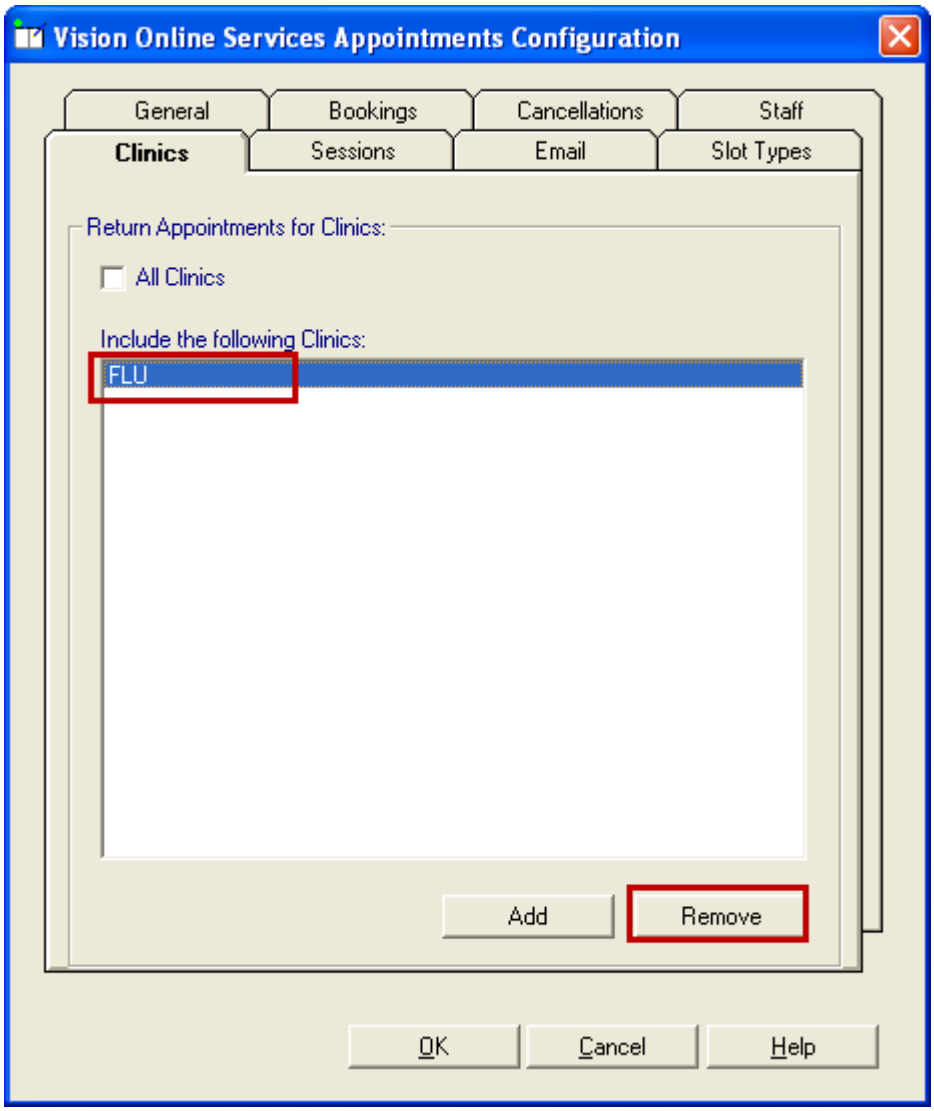


Figure 43: Clinics – Remove Clinic

2. You are prompted: *"Are you sure that you want to remove (name of clinic) from the list?* Click **Yes** to remove.

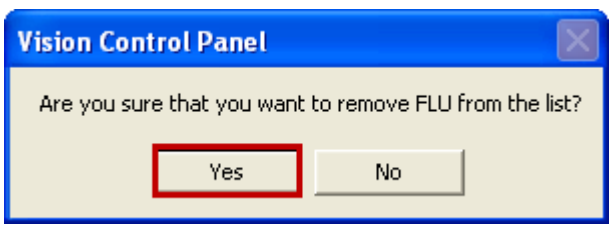


Figure 44: Remove Clinic Confirmation

Sessions Tab

This is used to configure the following:

- *Set Session Locations* (page 136)
- *Sites Configuration* (page 136)

Setting Session Locations

Use this facility to link a session to a location.

1. On Vision Online Services Appointments Configuration screen, select the Sessions tab.
2. The Set Session Locations window lists all sessions added/created in Vision Appointments.

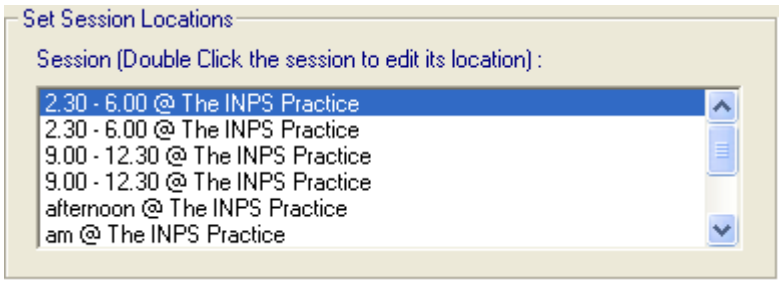

Set Session Locations
Session (Double Click the session to edit its location) :
2.30 - 6.00 @ The INPS Practice
2.30 - 6.00 @ The INPS Practice
9.00 - 12.30 @ The INPS Practice
9.00 - 12.30 @ The INPS Practice
afternoon @ The INPS Practice
am @ The INPS Practice

Figure 45: Sessions Tab - Set Session Locations

3. Double click on a session to edit its **Location.**

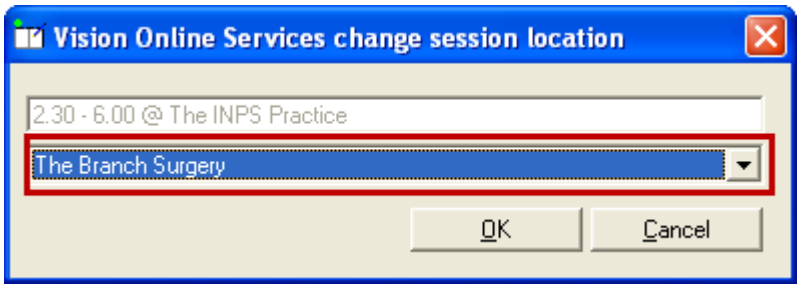


Figure 46: VOS Change Session Location

4. Select the location from the drop-down menu then click **OK.** Continue this process until you have set a location to each session, as required.

Setting Site Access

Site configuration is used to specify which Appointment session should be included on the Vision Online Services website for each location. This enables a practice to limit which sessions are included in Online Appointments.

1. Select Site from the **Notes Held at Site** drop down list, ie. Main Practice.
2. To add all sessions at that site, click the tick box – **All Sessions**.
3. Alternatively, add the sessions manually.
4. Click on the **Add** button and select a session from the drop down list. Click **OK** to add the next session(s) in the list, or **Cancel** to finish.
5. Continue this process until you have added all the required sessions.

6. If you have branch surgery(s) change the Notes Held at Site to the alternative location and add sessions for that location.
7. Continue this process until you have setup all branch sites.

> **Note** - If you add individual sessions, only those sessions added will be available and all other sessions will be disabled.

Remove Session

1. To remove a Session from the list, select the required location from the Notes Held at Site drop-down list, click to highlight the required session then click the **Remove**

button.
2. You are prompted: *"Are you sure that you want to remove (name of session) from the list?"* Click **Yes** to remove.

Slot Types Tab

When booking appointments online, the slot type is included in the patients' appointment display details. This facility enables you to change the text used by practice staff to something more appropriate for patients.

Figure 47: Appointment Book – Slot Type

All slot types added in Vision Appointments are displayed; the text in the VOS Text column can be amended, to make it more patient friendly, for example MS is changed to Minor Surgery. To add new slot types go to Vision Appointments.

Add Alternative text

1. From VOS **Appointments Configuration** select the **Slot Types** tab.
2. Double click the slot type to change; this opens the "VOS change VOS Text" window.
3. Type the text you want displayed to the patient online in the VOS text window.
4. Now setup has finished, click **OK** to save and return to the VOS Configuration screen.

5. Click **OK** to close.

Enabling Online Repeats

> **Note** - Staff must have System Manager (Full) access in Control Panel to enable and configure Vision Online Repeats. (England Only – see *RBAC User Guide* (*http://www.inps4.co.uk/downloads/cfh/rbac27v3*) for further details).

If you are new to Vision Online Services you first need to enable VOS and add a Welcome message, see "Enabling Vision Online Services".

Practices who have previously setup and used Online Appointments can quickly configure VOS for Online Repeats;

1. To activate **Online Repeats**, tick the Prescription **Enable** box in the **Services** section. This gives you access to tools to customise Online Repeats on the website.

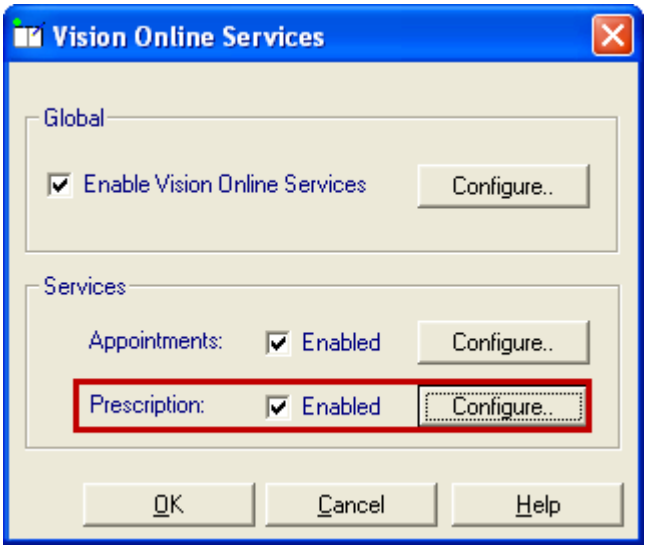


Figure 48: Enable Services – Online Repeats

2. Click the **Configuration** button to customise how the service will work for your practice. There are three tasks which require attention. See "*Configure Online Repeats* (page 138)".

Configure Online Repeats

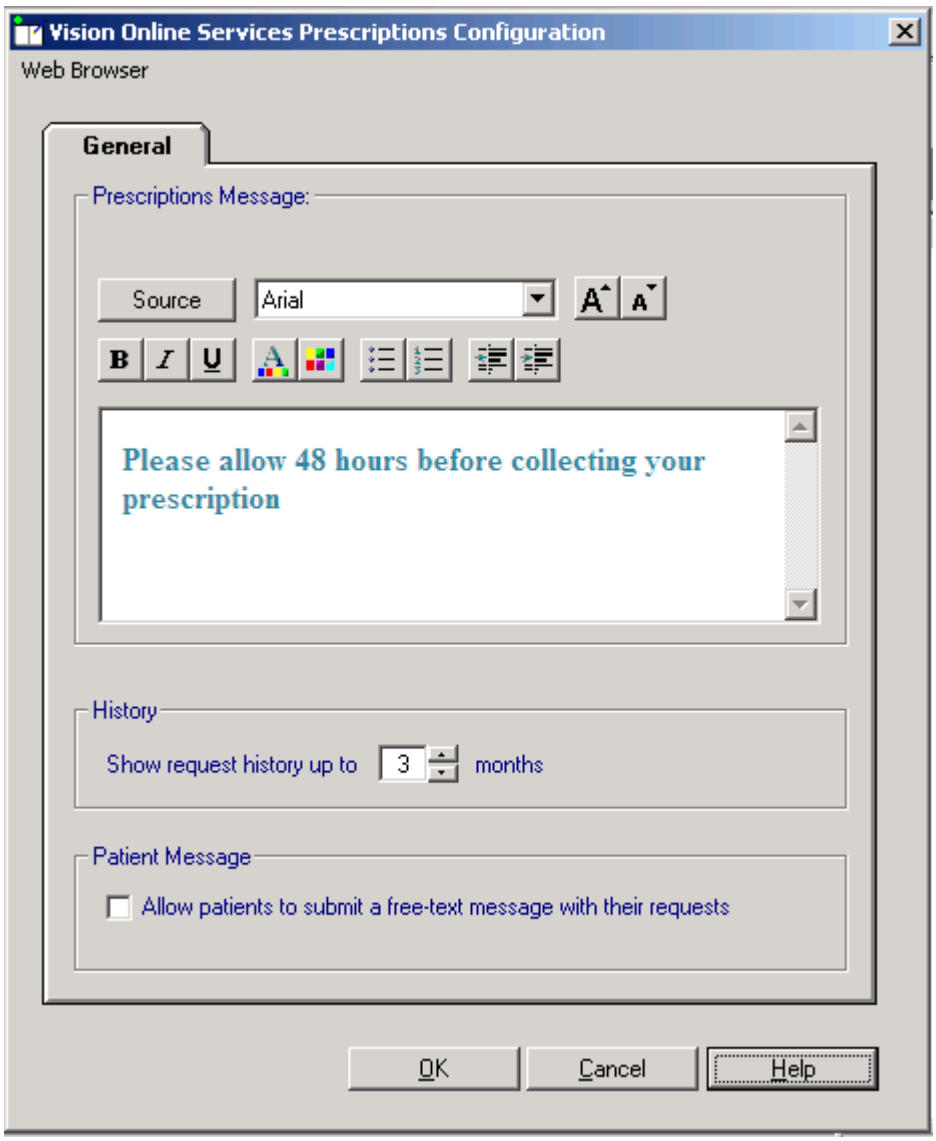
There are three tasks to complete which enable you to configure how patients use Online Repeats at your Practice. The tasks are:

- **Prescription Message –** This enables you to add a message to be displayed on each Online Repeat webpage. See "*Prescription Message* (page 139)" and "*Prescription Message - Wales* (page 139)".
- **History –** You can set a time period, which will determine how many historic repeat entries are displayed to the patient. See "*History* (page 141)".
- **Patient Message –** This sets whether a patient can send a free text message to the practice or not. See "*Patient Message* (page 141)".
- **Define the 'Old Repeat Offset'** - the duration entered which determines what repeat masters the patient can order in Online Repeats. See "*Old Repeat Offset* (page 141)".

Prescription Message

The prescription message entered here is displayed on all Online Repeat pages on the website.

1. Type your prescription message in the Prescriptions Message window using the formatting editor provided (see *Using the Message Editor* (page 143)).
2. If you prefer, you can customise your prescription message source using HTML formatting tags (see *Formatting HTML Messages* (page 143)).



Online Repeats Configuration - Prescriptions Message

3. Click **OK** to save.

Prescription Message - Wales

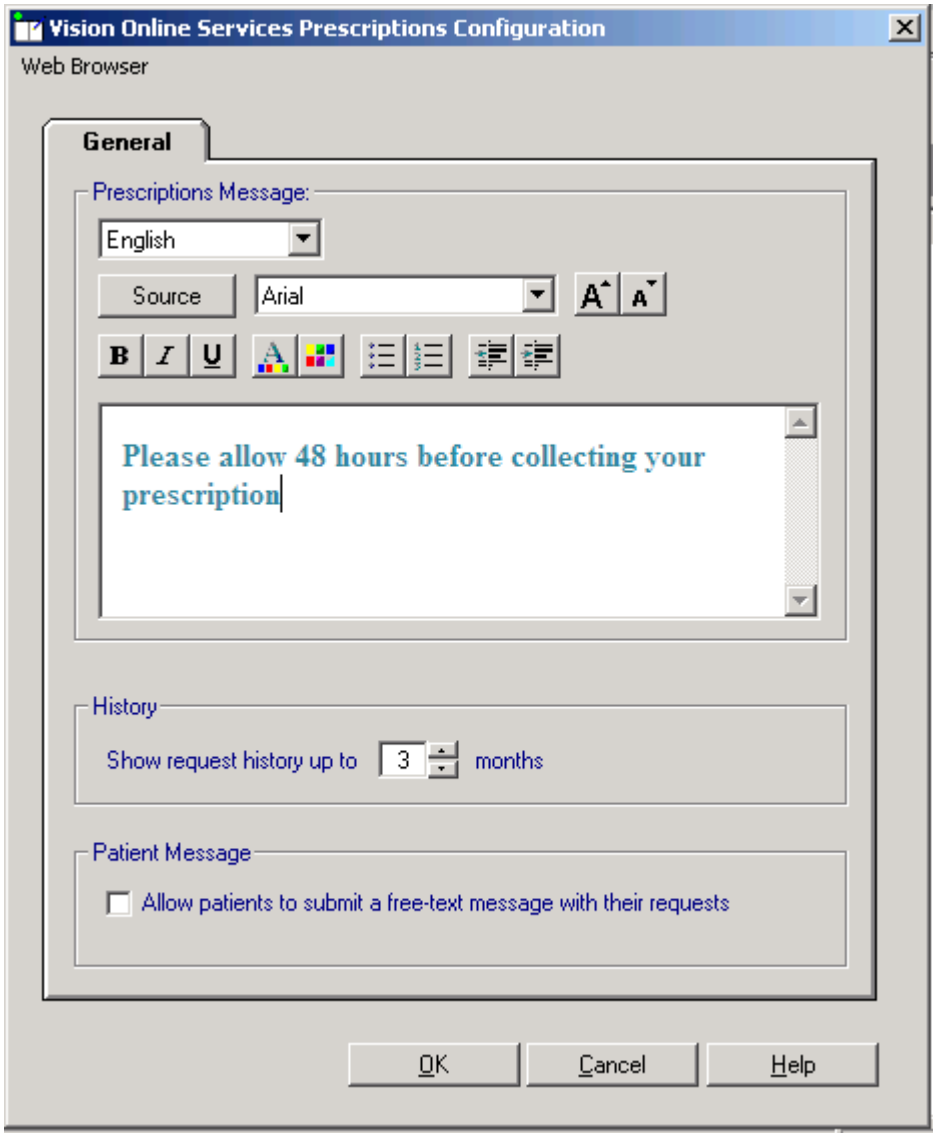
The prescription message entered here is displayed on all Online Repeat pages on the website.

1. Select **English** or **Welsh** from the drop-down list.

Note - selecting English allows you to enter the message to be displayed in the English version of My Health Online. Choosing Welsh allows you to enter the message for the Welsh version.

Type your prescription message in the Prescriptions Message window using the formatting editor provided (see *Using the Message Editor* (page 143)).

If you prefer, you can customise your prescription message source using HTML formatting tags (see *Formatting HTML Messages* (page 143)).



Online Prescription Configuration – Prescription Message

2. Choose the next language and type the translation of your text.
3. Click **OK** to save.

History

Use the arrows to select a number between 1 - 12 month(s), this determines the period of time displayed to the patient when viewing their repeat request history.

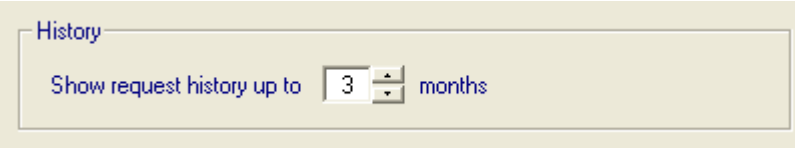
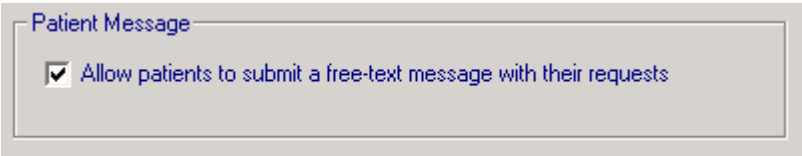


Figure 49: VOS Prescription Config - History

Patient Message

1. Tick the box to allow patients to submit a free-text message with their Online Repeat requests.



> **Note** - When this option is selected by the practice, a warning will be displayed advising you to ensure that the necessary processes are in place to check any messages entered by the patient.

2. Click **OK** to save your changes.

Old Repeat Offset

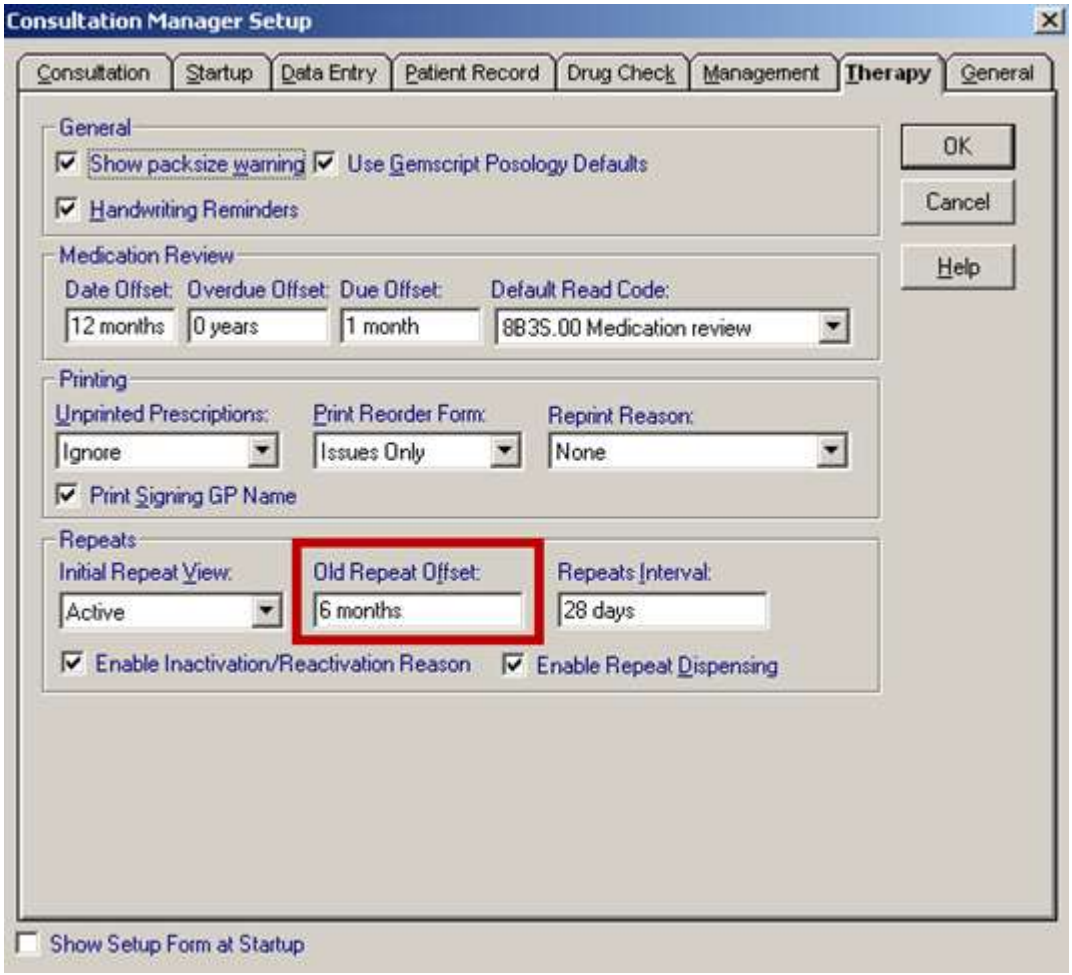
The duration entered in the 'Old Repeat Offset' box in the Therapy tab in Consultation Manager Setup determines what repeat masters the patient can order in Online Repeats. For example if a date offset of '4m' (4 months) is entered into the 'Old Repeat Offset' box, patients using online repeat ordering will only be able to order active repeat masters which have last been issued within this duration.

The offset date is also used to flag items in **Consultation Manager - Repeat Therapy List** with last issue dates outside this duration. The date appears in red for such items.

Change the Old Repeat Offset:

1. In Consultation Manager, select **Consultation - Options - Setup** to open the Consultation Manager Setup screen.

2. Click on the Therapy tab:



Consultation Manager Setup - Therapy Tab

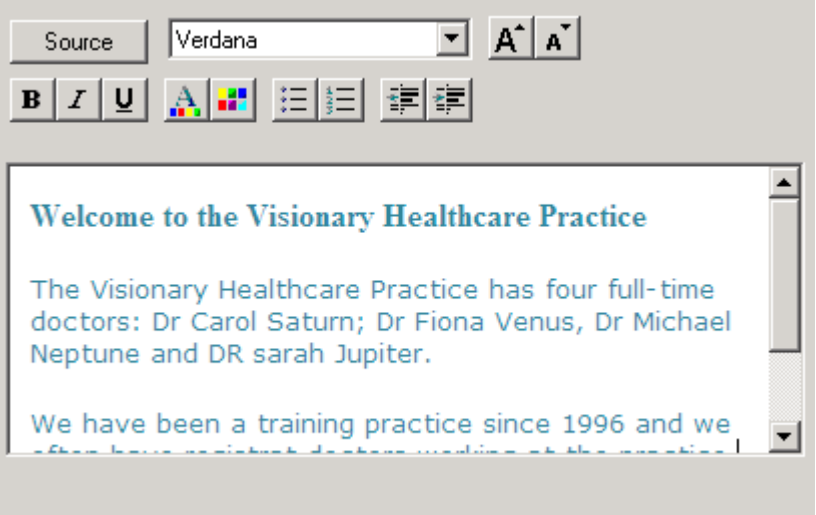
3. In the 'Old Repeat Offset' box, enter the required date offset using shorthand date entry (the default duration is 6 months) eg:
   - 30d = 30 days
   - 1m = 1 month
   - 1y = 1year
4. Click OK to save.

Note - This is a practice-wide setting.

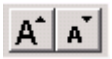
Formatting Messages

Using the Message Editor

The message editor allows you to format messages displayed to online users. It is available in the welcome, appointments and prescription message online configuration screens.


Source
Verdana
Welcome to the Visionary Healthcare Practice
The Visionary Healthcare Practice has four full-time doctors: Dr Carol Saturn; Dr Fiona Venus, Dr Michael Neptune and DR sarah Jupiter.
We have been a training practice since 1996 and we

Type your message in the welcome message window using the following formatting:

- - The **Source** button displays the HTML source of the message and is the only way you can add pictures and tables. If you are comfortable working with HTML tags, you may want to use this view to *edit the HTML directly* (page 143).
- - Font
-  Grow/shrink Font - Increases/decreases the text size of the highlighted text
- Bold, Italic, underlined
- - Text colour/ background colour
- - Bulleted/numbered list
- - Decrease/increase indent.

Formatting HTML Messages

Messages can be formatted using HTML formatting tags. HTML tags are:

- Used either side of a keyword eg <html> you wish to format.
- The tag always has angle brackets eg <html> denoting the starting and closing of the tag.
- HTML tags normally come in pairs eg (the starting tag) and (the closing tag)

- You can use multiple tags, but each tag must have brackets at the start and end of the tag eg

This is a list of the most common codes:

Starting Tag	Closing Tag	Description
<h1>	</h1>	First Heading. Headings can be defined with <h1> to <h6> tags. <h1> is the largest heading and <**h6**> is the smallest.
		Paragraph
		Bold text
<big>	</big>	Big text
		Italic text
<small>	</small>	Small text
_		Subscript text
[	]	Superscript text
 		This tag adds a single line break, it does not need a closing tag.

For example applying the bold <B> tag to the 1st line of the message like this:

Welcome to the <B>Welcome to the Visionary Healthcare Practice</B>

Will be displayed as:

Welcome to the Visionary Healthcare Practice (see below):

visiononline
Home
Help | Logout
Home
Appointments
Prescriptions
My Profile
Welcome Mr Rodway Adrian!
Welcome to the Visionary Healthcare Practice The Visionary Healthcare Practice has four full-time doctors: Dr Carol Saturn, Dr Fiona Venus, Dr Michael Neptune and Dr Sarah Jupiter. We have been a training practice since 1996 and we often have registrar doctors working at the practice. These are junior doctors whose previous experience has been largely confined to hospitals. They are attached to the practice for 6 months at a time.
Today is Tuesday 24 of May 2011, you last logged in on Tuesday 24 of May 2011 at 8:15AM - if this is incorrect, please log out immediately and contact your GP Practice for advice.
Please select from one of the following options:
Appointments
Prescriptions
My Profile

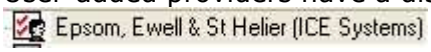
Test Requests

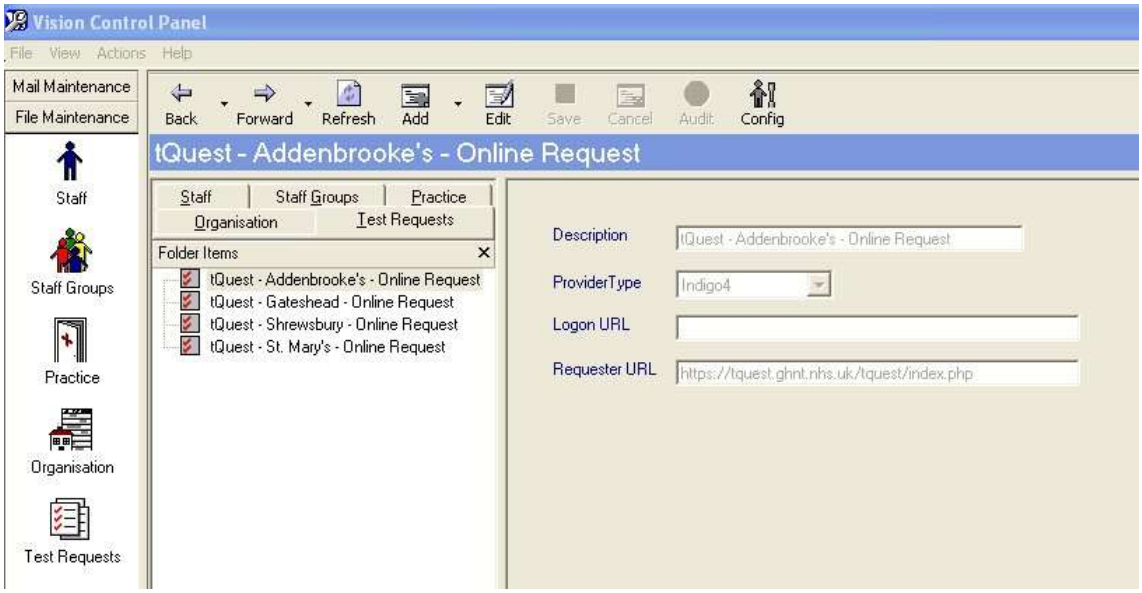
Setting up Electronic Test Requests in Control Panel

Electronic test requesting is available from within Consultation Manager and can link to the following requesting systems:

- Cyberlab
- ICE
- Technidata
- tQuest
- Plumbtree

This provides a link via a secure NHSnet connection, to the pathology lab system, directly from the patient's record within Consultation Manager.

1. Go to **Control Panel - File Maintenance - Test Requests**.
2. You will first need to add the provider with whom you will be linked. User-added providers have a distinctive icon, for example 



The available actions from the right mouse (click on existing list), or use

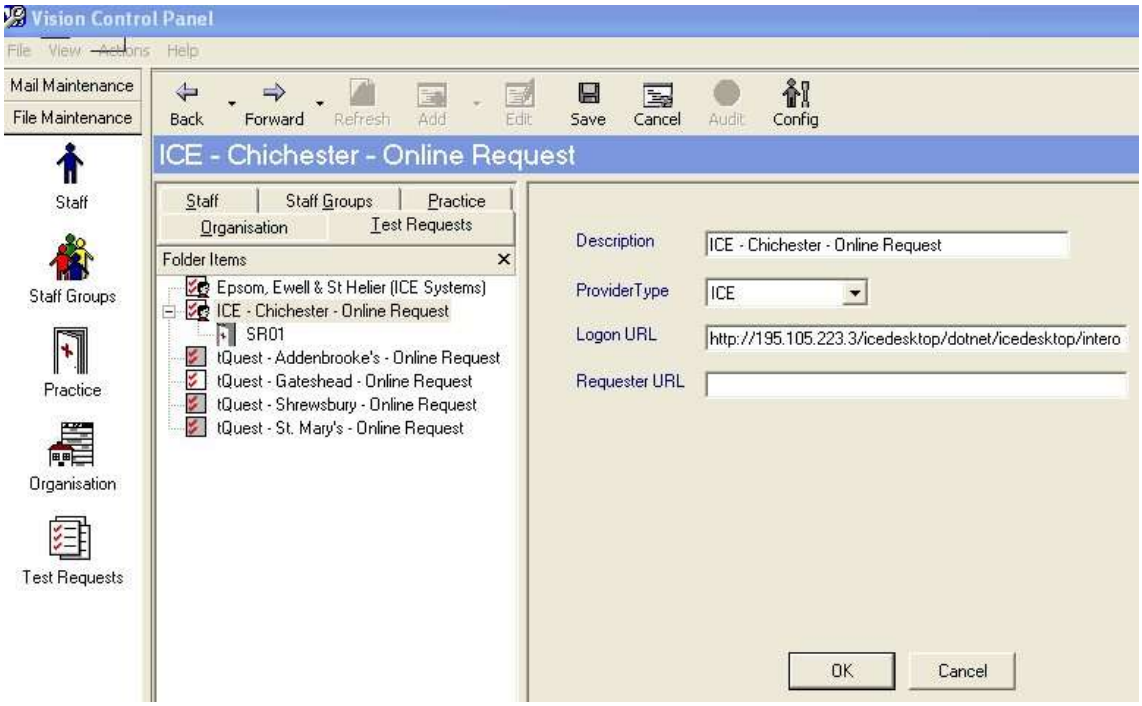
:

- **Add provider** - Add a new provider record (see Add or Edit a Test Request provider).
- **Edit provider** - Edit a user-added provider record.

- **Activate** - Sets the active flag to 'Y' and makes the provider available for selection.
- **Inactivate** - Sets the active flag to 'N' removing the provider from the default selection list (see *Inactivating Providers* (page 148)).
- **Add practice** - Available only if there are no user records for this provider (either practice or staff). Allows the user to enter the username and password in order to create a user record (see *Add practice* (page 149)).
- **Edit practice -** Changing the username and password for the practice record will automatically remove all staff records for this provider from the user database.
- **Remove practice** - This will also remove all staff records for this provider from the user database.
- **Remove staff password -** This option on a staff record will delete the record. See *Resetting Passwords* (page 148).

Add or Edit a Test Request provider

Firstly, you need to add the provider(s) which you intend to use for electronic test requesting. This is done from **Test Requests** in **Control Panel**. You will need the requester URL (for tQuest) or the logon URL (for Anglia ICE), Provider Type and Organisation Code which you can obtain from your trust.

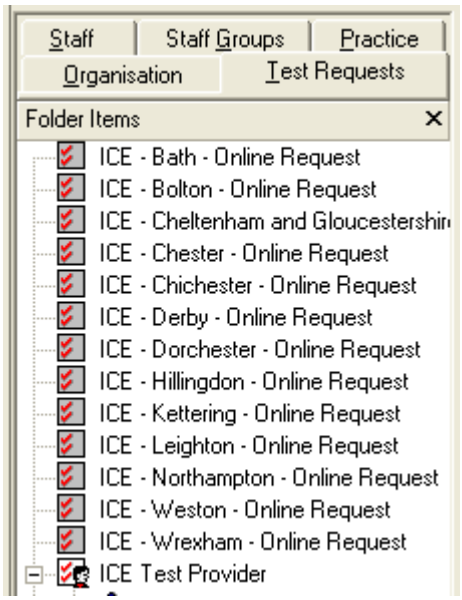


1. Click on the **Add** icon.

, or right click and select **Add Provider.**
2. **Description** - Type in the provider description (eg tQuest - Addenbrooke's - Online Request, or ICE - Chichester - Online Request).
3. **Provider type** - Select your provider.
4. **Organisation code** - obtain this code from the Trust.
5. **Logon URL** - If a tQuest provider, leave blank. If using Anglia ICE, enter the Logon URL, eg ICE - Chichester

http://195.105.223.3/icedesktop/dotnet/icedesktop/interop/service_request.aspx (*http://195.105.223.3/icedesktop/dotnet/icedesktop/interop/service_request.aspx \o http://195.105.223.3/icedesktop/dotnet/icedesktop/interop/service_request.aspx*).

6. **Requester URL** - leave this blank for ICE providers. Details are provided by your Trust.
7. Click OK to save changes. The provider details are added to the list in the Test Request Pane in Control Panel: tQuest Test Provider .

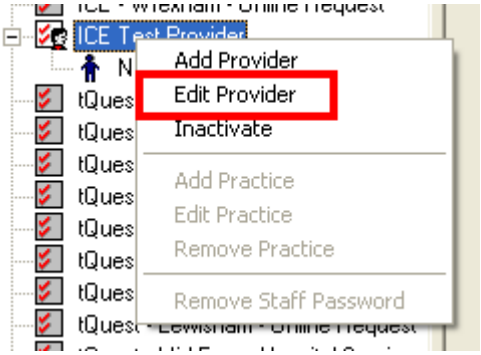

Staff
Staff Groups
Practice
Organisation
Test Requests
Folder Items
ICE - Bath - Online Request
ICE - Bolton - Online Request
ICE - Cheltenham and Gloucestershir
ICE - Chester - Online Request
ICE - Chichester - Online Request
ICE - Derby - Online Request
ICE - Dorchester - Online Request
ICE - Hillingdon - Online Request
ICE - Kettering - Online Request
ICE - Leighton - Online Request
ICE - Northampton - Online Request
ICE - Weston - Online Request
ICE - Wrexham - Online Request
ICE Test Provider

Editing Providers

If you need to change the details of a provider, for instance, if the provider changes their URL:

1. From the Vision front screen, go to **Management Tools - Control Panel**

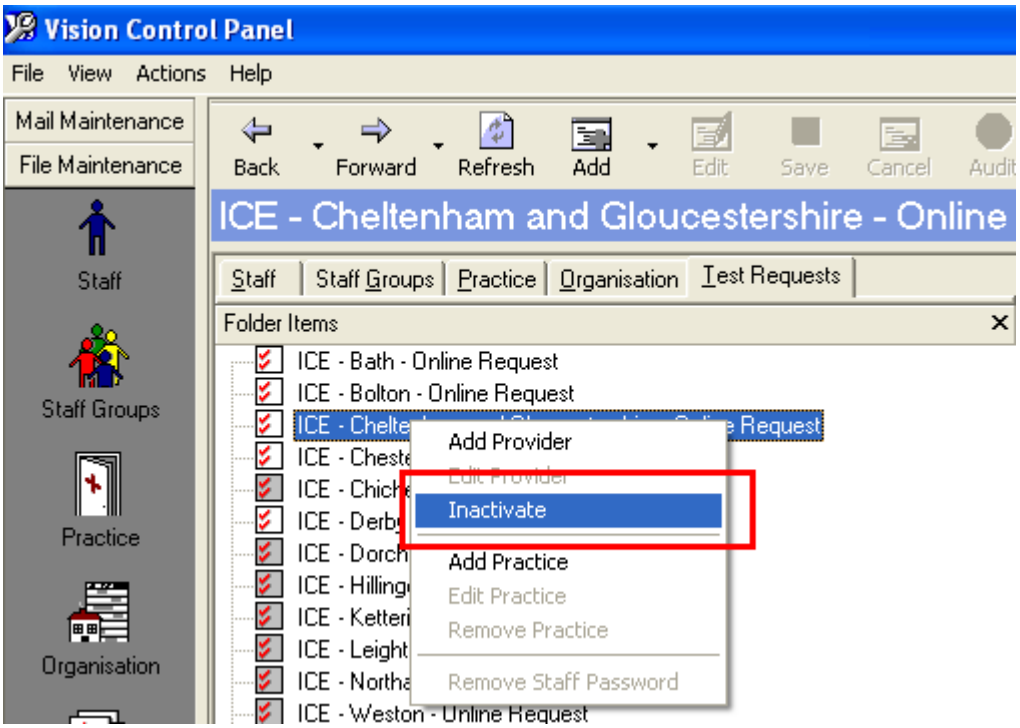
2. Select **File Maintenance** and click on the **Test Requests** icon.
3. Right click on the provider you would like to change and select **Edit Provider**.



4. Make the necessary changes, and click OK to save.

Inactivating Providers

1. To inactivate a test request provider, from **Control Panel - File Maintenance - Test Requests**, right click on the required provider and select **Inactivate**.



2. The inactive provider remains in the list but displays a grey icon.

See also:

Setting up Electronic Test Requests in Control Panel (page 145)

Add or Edit a Test Request provider

Resetting Passwords (page 148)

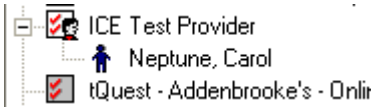
Add practice (page 149)

Resetting Passwords

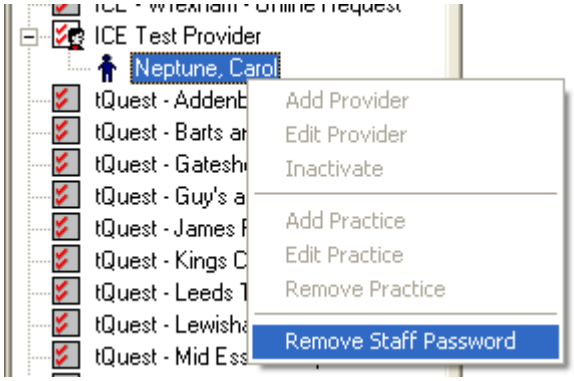
You can reset a password **from Control Panel – Test Requests**. You might need to do this, for instance, if a user has opted to save their password details on the Select System and Account screen in Consultation Manager, but has saved the wrong password details.

1. Go to **Management Tools - Control Panel**.
2. Select the **Test Requests** icon.

3. Click on the plus ⊞ next to the provider for the failed login to view a list of the staff listed to use this provider.



4. Right click on the failed login user, select **Remove Staff Password**.



5. You can enter a new password when you next attempt to login to ICE from Consultation Manager.

See also:

Setting up Electronic Test Requests in Control Panel (page 145)

Add or Edit a Test Request provider

Inactivating Providers (page 148)

Add practice (page 149)

Add practice

This is optional. You can either add a practice record now for a Test Request provider, or you can set either a user or practice when making a test request in Consultation Manager.

Either each user has their own record or there can be one per practice. Adding a practice record lets any practice member make a test request.

The right menu option of **Add practice** is available only if there are no user records for this provider (either practice or staff). It allows the user to enter the username and password in order to create a user record.

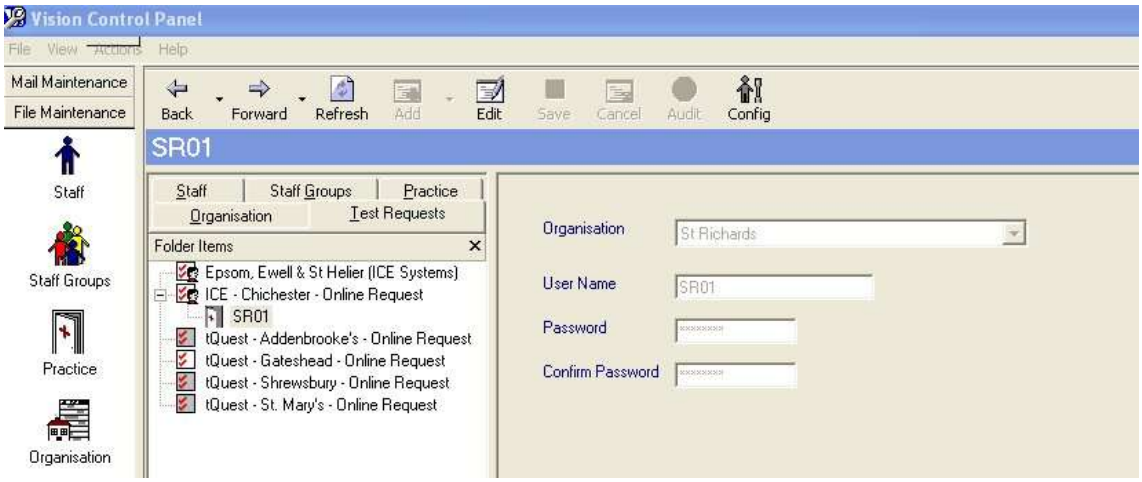
1. Right click on the **Test Request Provider** and select **Add practice**.
2. In Organisation, select the Provider.
3. User Name and Password - Information you can get from your Trust.
4. Confirm the password.

See also:

Setting up Electronic Test Requests in Control Panel (page 145)

Add or Edit a Test Request provider

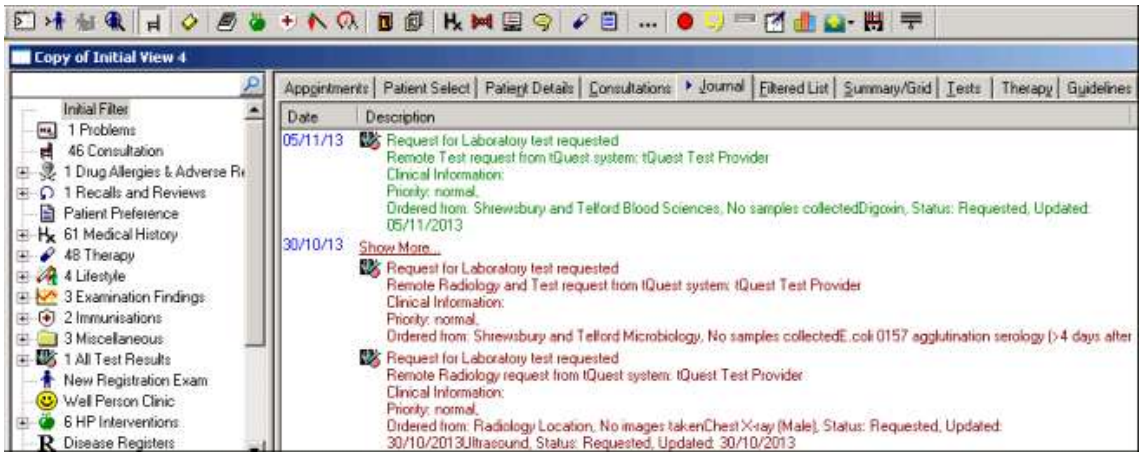
Inactivating Providers (page 148)



tQuest Only - Radiology Test Requests

When you select a radiology test from your tQuest test request system it is now displayed as one of the following within Consultation Manager:

- **Remote Radiology and Test request from tQuest system...** - which indicates a mixture of radiology and pathology tests.
- **Remote Radiology request from tQuest system...** - which indicats a radiology request only.



Example Radiology requests

Vaccine Usage Reporting - Public Health England

Introduction

In order to improve local and central stock management and prevent wastage of vaccinations, Public Health England have introduced the Vaccine Usage report. This report will be sent from Vision to the ImmForm Vaccine Supply system, as with existing vaccine extract reports. PHE will use this report to:

- To improve central vaccine supply management by providing visibility of vaccine usage and availability.
- To prompt practices when a new order is likely to be needed.
- Give practices optional alerts when certain events occur, e.g.:
  - Stock is due to expire within a month.
  - Expired stock has been administered.
  - Stock is being administered out of rotation.
  - Stock has now expired and should not be used.
- To improve the automatic validation of orders placed based on typical usage history.

Your practice has a choice whether to participate in this scheme. See *Practice Consent* (page 151) for details.

Depending on your practice's consent status, the following reports will be automatically generated and sent to ImmForm (they do not contain patient identifiable data):

- Daily submissions, summarising the number of doses of specific vaccines given - see *Daily Vaccine Usage Report* (page 153).
- Monthly submissions, summarising the number of active patients by age and sex cohorts - see *Monthly Practice Cohort Report* (page 155)

Practice Consent

You can choose to explicitly opt in or out of the Vaccine Report scheme. Consent is also implied unless explicit dissent/consent is recorded within 28 days of receiving the DLM update. You can also change your mind at any time:

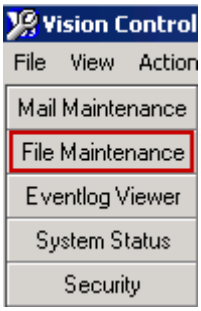
- See *Opting out of Sending Vaccine Usage Reports* (page 151) for details on opting out of the Vaccine Usage scheme.
- See *Opting in with Immediate Effect to Sending Vaccine Usage Reports* (page 152) for details on opting in to the Vaccine Usage Report scheme.

Important - If you do not manually change the Practice Consent, after 28 days you are automatically opted in.

Opting out of Sending Vaccine Usage Reports

1. Log in to Vision with an account that has administrator rights.
2. From **Vision Main Menu - Management Tools** select **Control Panel.**

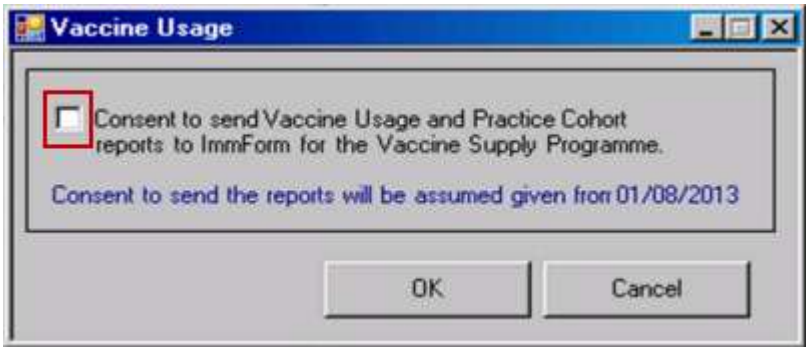
3. Select **File Maintenance**.



Control Panel - File Maintenance

4. Select **Actions - Vaccine Usage**, or click the Usage icon

.
5. **Vaccine Usage** is displayed.
6. Click to remove the tick in *Consent to send Vaccine Usage and Practice Cohort reports to ImmForm for the Vaccine Supply Programme.*


Vaccine Usage
Consent to send Vaccine Usage and Practice Cohort reports to ImmForm for the Vaccine Supply Programme.
Consent to send the reports will be assumed given from 01/08/2013
OK
Cancel

Vaccine Usage with tick removed from Consent to send Vaccine Usage and Practice Cohort reports

7. Click **OK** to save and close.

You can change your mind at any time and opt in to sending your Vaccine Usage Reports - See *Opting in with Immediate Effect to Sending Vaccine Usage Reports* (page 152).

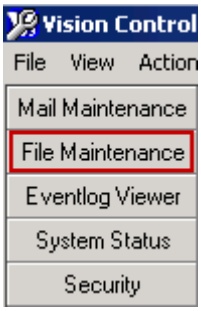
If you decide to opt out after a period of sending your vaccine usage reports, the extract process is stopped, but the data already submitted stays with ImmForm.

Opting in with Immediate Effect to Sending Vaccine Usage Reports

> **Remember** - Consent is implied unless explicit dissent/consent is recorded within 28 days of receiving the DLM update.

1. Log in to Vision with an account that has administrator rights.
2. From **Vision Main Menu - Management Tools** select **Control Panel.**

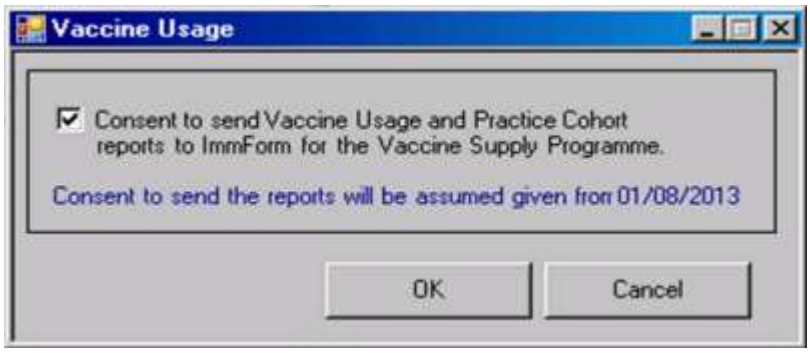
3. Select **File Maintenance**.



Control Panel - File Maintenance

4. Select **Actions - Vaccine Usage**, or click the Usage icon

.
5. **Vaccine Usage** is displayed.


Vaccine Usage
Consent to send Vaccine Usage and Practice Cohort reports to ImmForm for the Vaccine Supply Programme.
Consent to send the reports will be assumed given from 01/08/2013
OK
Cancel

Vaccine Usage - Consent to send Vaccine Usage and Practice Cohort reports option

6. Click **OK** to save and close.

Daily Vaccine Usage Report

The daily Vaccine Usage Report is a daily breakdown of the vaccines your practice has administered; it is sent to PHE via the ImmForm web service. The following is a list of the Vision Immunisation Types (including compounds) that are currently included in the daily Vaccine Usage Report:

ImmForm Product Name	Vision Immunisation/Compound Type
DTaP/Hib/IPV	Diphtheria, Tetanus, Pertussis, Polio, Hib
PCV	Pneumococcal conjugate Pneumococcal conjugate Prevenar 13
MEN C	Meningococcal C
HIB/MEN C	HIB/Meningacoccal C
MMR	Measles, Mumps, Rubella
HPV*	Human Papillomavirus (Cervix) Human Papillomavirus (Gardasil)
DTap/IPV and dTap/IPV	Diphtheria, Tetanus, Pertussis, Polio
Td/IPV (under 18's only***)	Diphtheria, Tetanus, Polio
BCG	BCG

PPD**	See note below
Rotavirus	Rotavirus
Shingles	Shingles
Flu	Influenza Seasonal****

* For HPV, Vision has two Immunisation types representing the two available brands of vaccine, Gardasil (HPV) and Cervarix (HPVCER). each brand is reported separately.

** PPD is recorded in Vision as a test not a vaccine, Batch Ref is therefore always reported as blank.

***The patient's age as at the event date must be less than 18 years.

****The new intranasal influenza vaccine is not counted for the purposes of the Vaccine Usage Report.

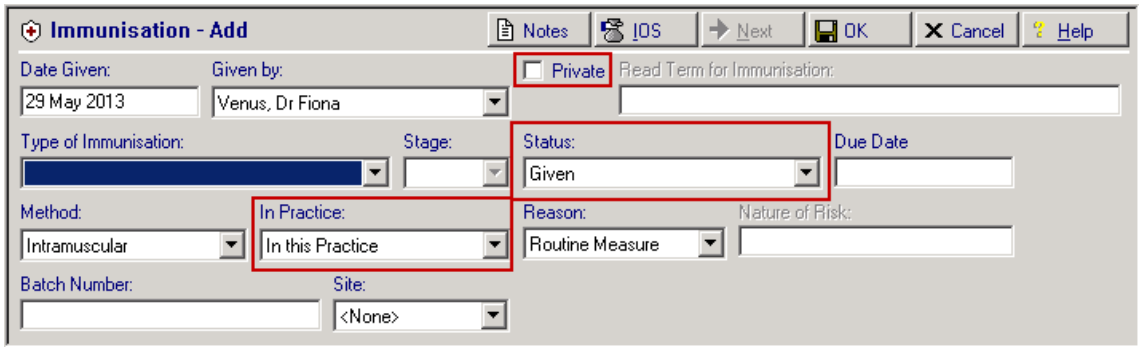
> **Note** - The above list of vaccines is submitted daily including weekends, if no vaccines have been administered the report is sent with a vaccine count of zero.

Other Qualifying Immunisation Information

To be included in the daily Vaccine Usage Report, the immunisations listed in the table must have:

- Been recorded in the Immunisation Structured Data Area (SDA).
- A **Status** of **Given.**
- An **In Practice** selection of "**In this Practice**".
- No tick in the **Private** tick box.

Or for the PPD vaccine, recorded in the patient's history with the Read code starting **332%** Tuberculin test - Manoux, excluding **3322**. Mantoux test not done.



Immunisation - Add

> **Note** - All of the qualifying administered vaccines are included in the report, regardless of the patients Registration status.

Other information Included in the Daily Report

The following information is included in the daily submission:

- Your practice code
- The vaccine being reported on

- The date the vaccine was administered
- The brand of the vaccine where appropriate (this currently only applies to HPV within Vision)
- The Batch number, where recorded

Monthly Practice Cohort Report

The monthly Practice Cohort Report is a breakdown of the practice population by age. This is sent to PHE via the ImmForm web service on the first day of the following month.

Your practice population is split into the following age bands:

Cohort Description	Age Range
0m	From Birth to 1 month less a day
1m	From 1 month to 2 months less a day
2m	From 2 months to 3 months less a day
3m	From 3 months to 4 months less a day
4m	From 4 months to 5 months less a day
5m	From 5 months to 6 months less a day
6m	From 6 months to 7 months less a day
7m	From 7 months to 8 months less a day
8m	From 8 months to 9 months less a day
9m	From 9 months to 10 months less a day
10m	From 10 months to 11 months less a day
11m	From 11 months to 12 months less a day
12m	From 12 months to 13 months less a day
13m	From 13 months to 14 months less a day
14m to 23m	From 14 months to 24 months less a day
2y	From 2 years to 3 years less a day
3y	From 3 years to 4 years less a day
4y	From 4 years to 5 years less a day
5y	From 5 years to 6 years less a day
6y	From 6 years to 7 years less a day
7y	From 7 years to 8 years less a day
8y	From 8 years to 9 years less a day
9y	From 9 years to 10 years less a day
10y	From 10 years to 11 years less a day
11y	From 11 years to 12 years less a day
12y	From 12 years to 13 years less a day
13y	From 13 years to 14 years less a day
14y	From 14 years to 15 years less a day
15y	From 15 years to 16 years less a day
16y	From 16 years to 17 years less a day

17y	From 17 years to 18 years less a day
18y to 64y	From 18 years to 65 years less a day
65y and Over	From 65 years and over

This information is identified by your Practice Code.

Qualifying Records

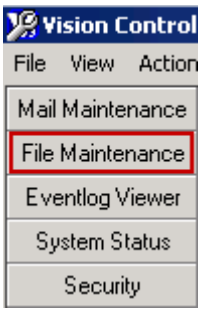
To be included in the Monthly Cohort Report, the patient must be registered to the practice as Permanent or Applied on the first day of the month following the reporting month.

Sending the Reports

The process for sending your Vaccine Usage Reports is completely automated, once you have given consent (either implied or complicit) the reports are sent daily. If PHE ask your practice to resend a report, it can be recreated and sent by setting a new start date within the **Vaccine Usage** form.

To recreate and resubmit reports:

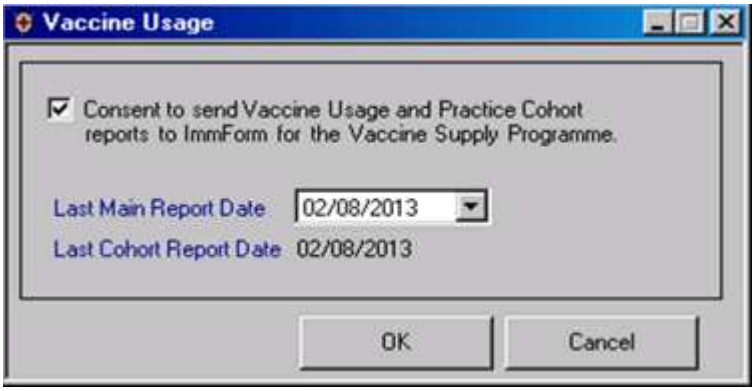
1. Log in to Vision with an account that has administrator rights.
2. From **Vision Main Menu - Management Tools** select **Control Panel.**
3. Select **File Maintenance**.



Control Panel - File Maintenance

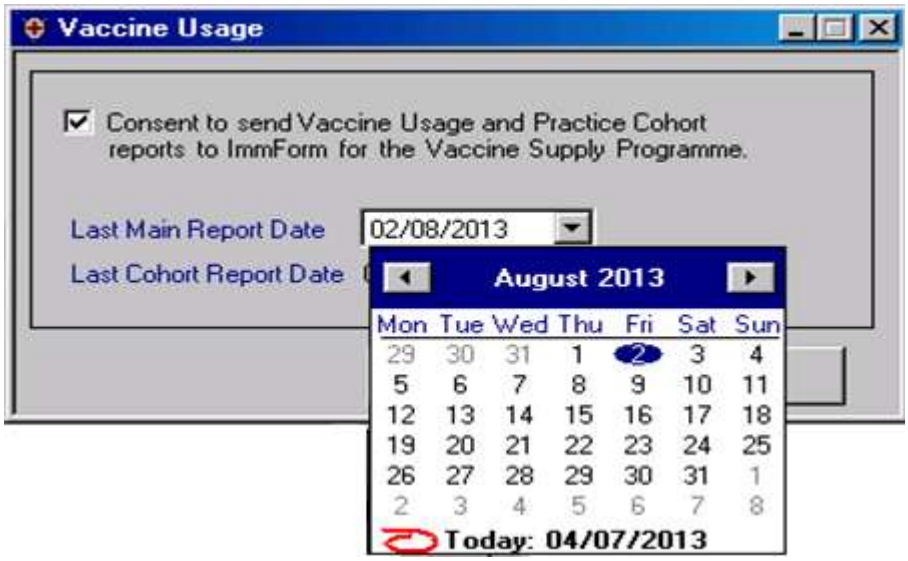
4. Select **Actions - Vaccine Usage**, or click the Usage icon

.
5. **Vaccine Usage** is displayed.



Vaccine Usage with Last Main Report Date option

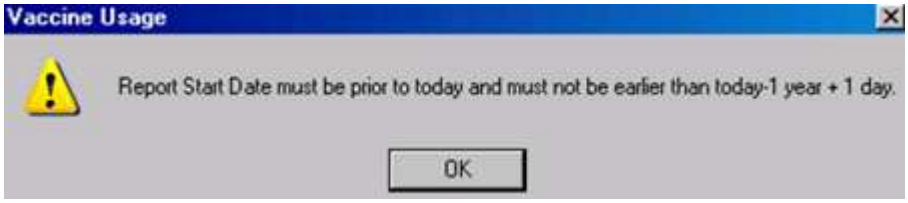
6. Click on the down arrow alongside **Last Main Report Date,** a calendar is displayed.


Vaccine Usage
Consent to send Vaccine Usage and Practice Cohort reports to ImmForm for the Vaccine Supply Programme.
Last Main Report Date
02/08/2013
Last Cohort Report Date
August 2013
Mon Tue Wed Thu Fri Sat Sun
29 30 31 1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 31 1
2 3 4 5 6 7 8
Today: 04/07/2013

Vaccine Usage with calendar

7. Select the date you want to resend from by either:
   - Clicking on today's date
   - Clicking on a date before today but within the last year

> **Note** - If you do select a date that is not within the above criteria a *Report Start Date must be prior to today and must not be earlier than today - 1 year +1 day* message is displayed. Click on **OK** and select a valid date.



Report Start Date must be prior to today and must not be earlier than today - 1 year + 1 day message

8. Click **OK** to save and close.
9. The next time your extract is scheduled to run, the reports are regenerated and sent automatically.

First Report Run

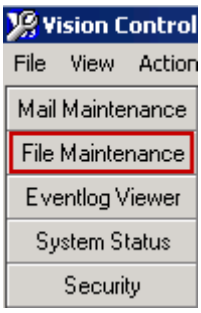
The first time the reports are run on your system, Vision compiles a report for every day in the last 12 months.

> **Note** - If you do not have 12 months of data on your system it compiles from the earliest available date within the last 12 months.

Checking the Reports

To check the last date the Vaccine Usage Reports were run:

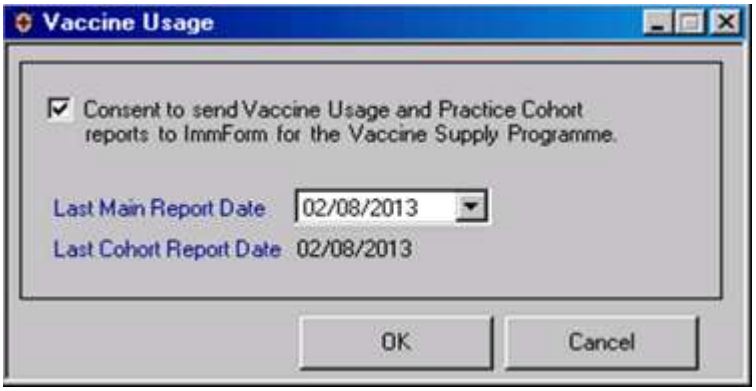
1. Log in to **Vision** with an account that has administrator rights.
2. From **Vision Main Menu - Management Tools** select **Control Panel.**
3. Select **File Maintenance**.



Control Panel - File Maintenance

4. Select **Actions - Vaccine Usage**, or click the Usage icon

.
5. **Vaccine Usage** is displayed.



Vaccine Usage with Last Main Report Date option

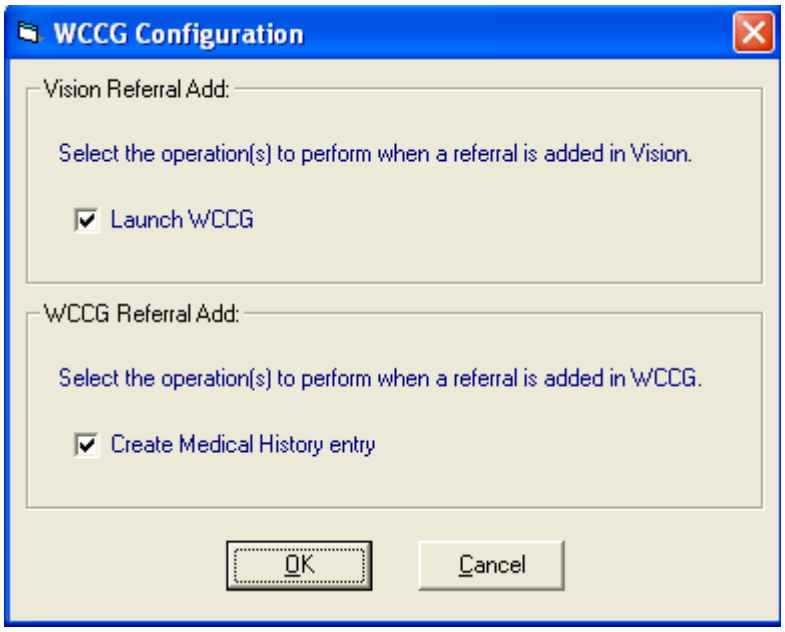
6. The **Last Main Report Date** and the **Last Cohort Report Date** are displayed.
7. Click **Cancel** to exit.

Welsh Clinical Communications Gateway (WCCG) Configuration

Vision can be configured to automatically add a medical history and/or referral whenever a WCCG referral is created. This system-wide configuration is maintained in Vision Control Panel.

1. Go to **Vision – Management Tools – Control Panel.**
2. Select **File Maintenance**.
3. From the **Actions** menu, select **WCCG Config**.
4. Tick the checkboxes to automatically create medical history and referral entries.

Note - By default both these options will be on.


WCCG Configuration
Vision Referral Add:
Select the operation(s) to perform when a referral is added in Vision.
Launch WCCG
WCCG Referral Add:
Select the operation(s) to perform when a referral is added in WCCG.
Create Medical History entry
OK
Cancel

Staff Languages - Reporting

You can record the spoken, written and read language skills of your staff in File Maintenance (see *Staff - Language Tab* (page 64)).

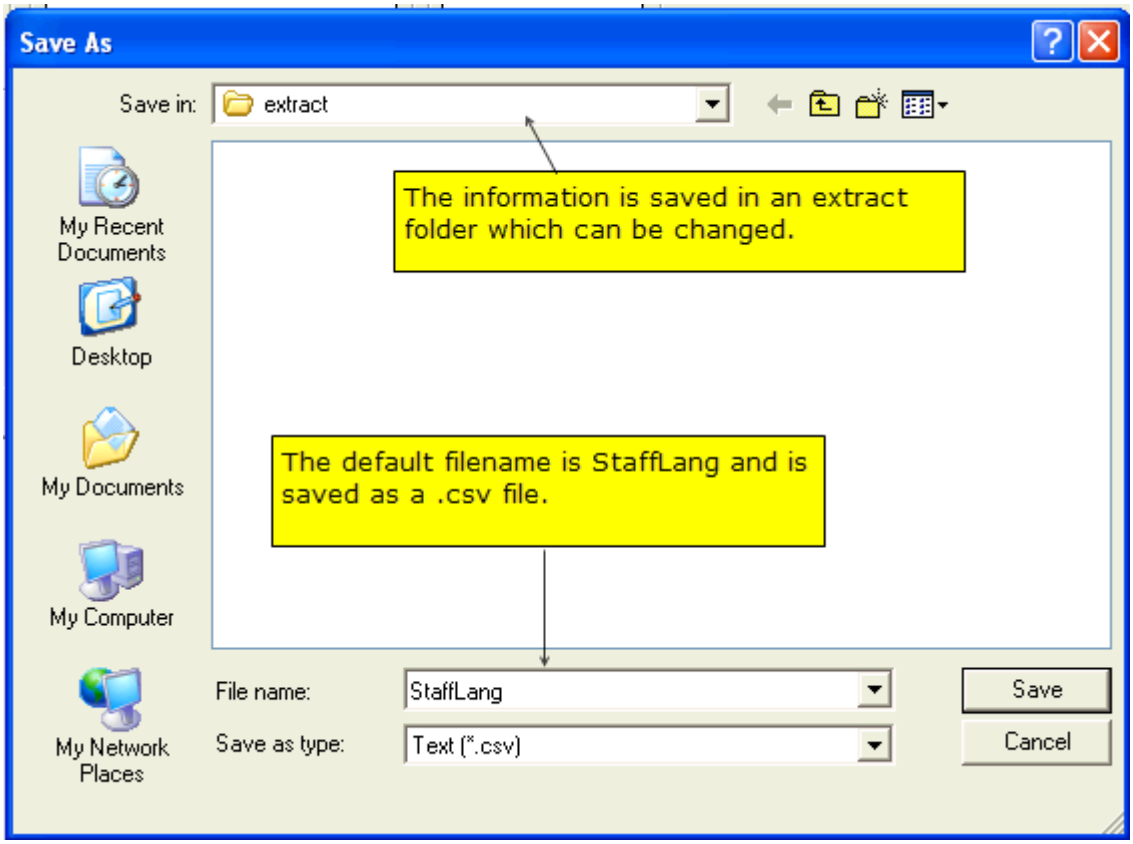
You can export staff language details to file. This will allow you, or health boards, to view written, spoken and read language resources in your practice.

1. In **File Maintenance** - select **Actions**.
2. Choose the option **Export Staff Language**.
    - **Include header record** - This is checked by default and includes a heading in the file when it is exported. Removing the tick means that no heading information is displayed when you view the exported file.
    - **Include languages not for communication** - This is checked by default and exports staff information, including staff id, staff name and languages. Removing the tick will stop this information from being exported.

Export Staff Language Options

3. Click **OK** to save the file.
4. The **Save As** screen defaults to the **extract** folder where the file will be saved, unless changed. The file name is **StaffLang** and is a csv file, but this information can be also be changed.

> **Note** - CSV files (comma separated values) are files that can be viewed in Excel.

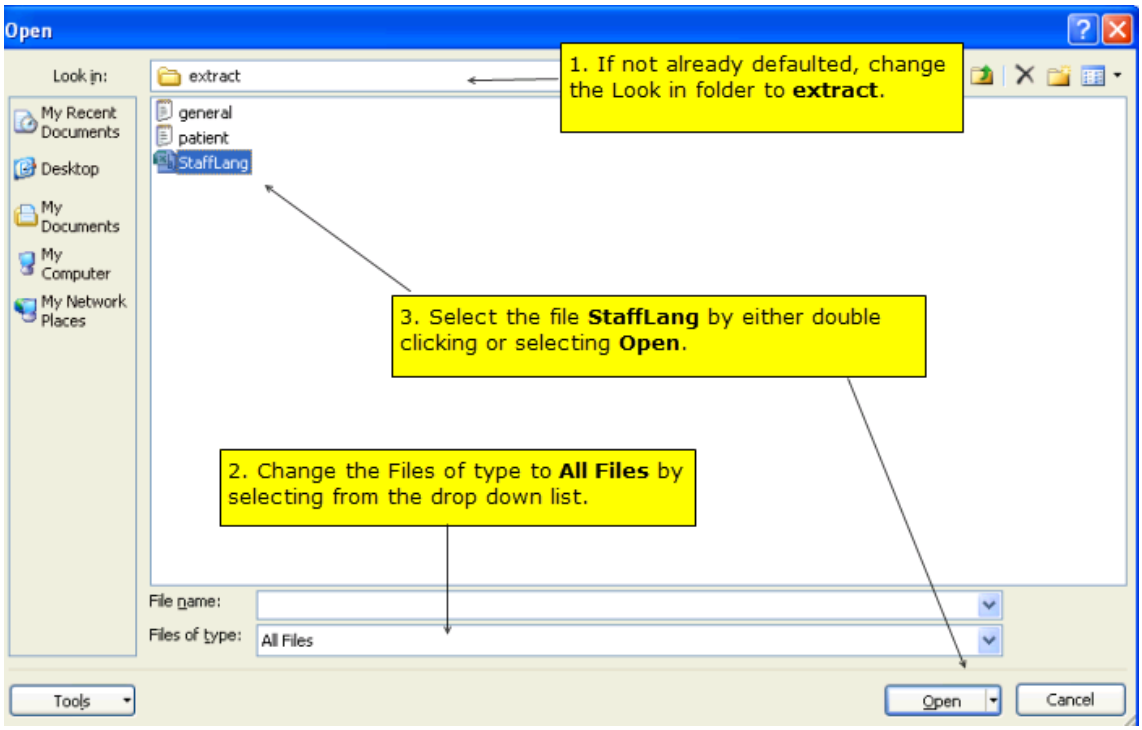


Staff Export save screen

5. Select **Save** and a confirmation screen appears confirming that the file has been created successfully - click **OK**.

Viewing the Staff Language Export File

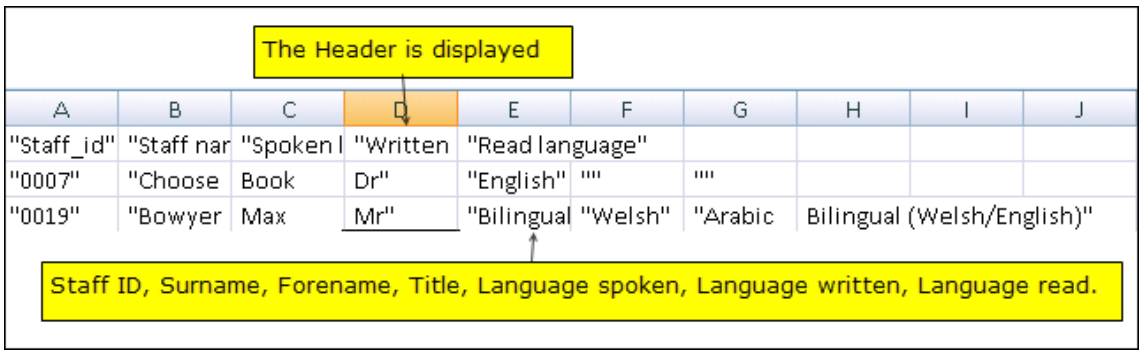
The file can be opened in **Excel** by selecting **Open.** Change the 'Look in' folder to the **extract** folder and change the 'Files of Type' to **All types**. Highlight the file **StaffLang** and click **Open**.



Excel - Viewing the Staff Language file (temporary image)

A wizard appears in Excel - select **Delimited** and click **Finish**.

The file is displayed in the following format.


The Header is displayed
A B C D E F G H I J
"Staff_id" "Staff nar "Spoken l "Written "Read language"
"0007" "Choose Book Dr" "English" "" ""
"0019" "Bowyer Max Mr" "Bilingual "Welsh" "Arabic Bilingual (Welsh/English)"
Staff ID, Surname, Forename, Title, Language spoken, Language written, Language read.

Excel - Exported Staff File

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